

**ALLYSON
BECKHAM**

**Texts
B Perleberg**

10:00 AM

10:04 PM

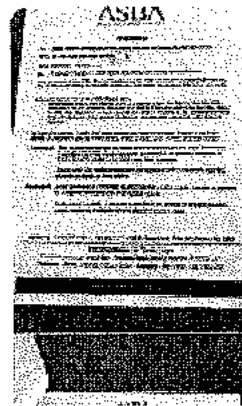
10:05 PM

New Message

Cancel

To: Barbara Goldberg

Mon, Sep 24, 1:12 PM



in 1/1/2008

2:05 PM

1/1/2008

New Message

Cancel

Re: Barbara Priebeberg

Wed, Nov 20, 2007

Hi Barbara, Is the GS giving Dr K his mid year evaluation in December as per in the policy?

Is it on the agenda?

Wed, Nov 21, 2007

I am meeting with Dr. Kriekard tomorrow to discuss agenda. I believe it is on the schedule but I will confirm. Thank you.

u Simon

2:05 PM

100%

New Message

Cancel

To: Simon, Patricia

Do you find out the Sup
available for scheduled?

John is talking to Michelle
about [REDACTED], and
then he's going to call you
directly. [REDACTED]

he will call you directly to
discuss any concerns.
Thanks!



● 1977 年 12 月 25 日

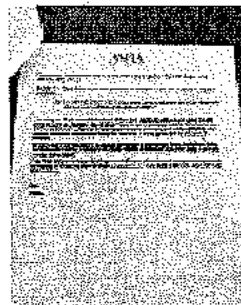
2024年12月

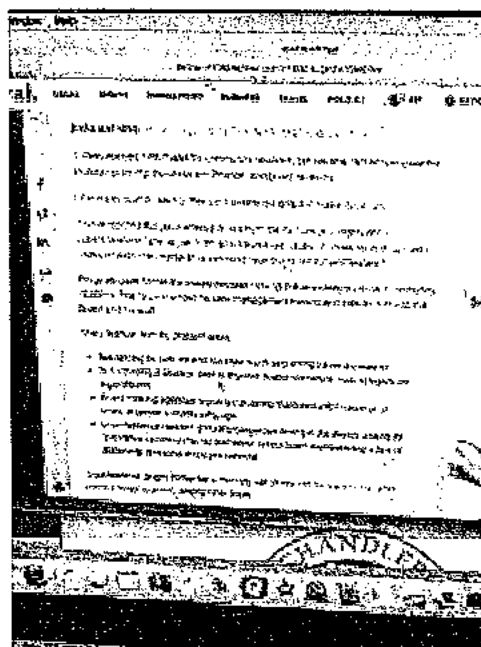
[illegible]

Many Uses

4555

U.S. Department of Energy

[illegible]



2:05 PM
New Message Cancel

To: Barbara Pollock

Sent: Thursday, April 20, 2012 2:05 PM

I am meeting with Dr. Kriekard tomorrow to discuss agenda. I believe it is on the schedule but I will confirm. Thank you.

[REDACTED]

[REDACTED]

[REDACTED]

at 10:00 AM 10:00 AM 100% B

New Message

Cancel

To: [Redacted]
[Redacted]

(4)

Wed, May 5, 1:20 PM

Hi, Allyson. Great talking
with you this morning. Just
one caution about the letter
if you end up doing that -
make sure with Michelle it
follows all the OML rules.



q w e r t y u i o p

a s d f g h j k l

[Back] z x c v b n m [Enter]

[App Store] [App Store] [App Store] [App Store] [App Store]

in Under 5 2:05 PM 1/13/14

New Message

1/13/14

Dr. Patricia Hinkley

Yes, Sandra sent an email

version as well. John and I
are meeting Friday to
finalize the agenda
schedule for the rest of the
year. Can I ask you what
your initial thoughts are on
Proposal A?

ASBA needs to provide the
amendment on equity they
are asking to be approved. I
don't see one. As written
it's just the idea of adding a
statement on equity. Your
thoughts?

I just sent you an email

1/13/14

1/13/14

**ALLYSON
BECKHAM**

**Pam Kirby
TEXTS
2/19-5/19**

at 10:00 AM 1:00 PM 1:00 PM
New iMessage Cancel

To: Jane Kirby

iPhone
Fri, Feb 1, 10:00 AM

I heard at last board meeting you ask for counselors. Are you looking for mental health professionals or academic planning professionals?

We need both. The situation needs to be evaluated and a plan put in place.



all Vector 1:45 PM 1:45 PM
New Message (Cancel)

To: Jane Kirby

Thu Feb 15, 2:04 AM

FYI, I gave that capacity
spreadsheet to JK when I
built it a couple months ago.
I think I did it in prep for the
Navajo vote

Remember

Sun Mar 11, 12:17 PM

[REDACTED]

New Message

[REDACTED]

2 3

1

at Verizon 3:41 PM 100%
New Message Cancel

To: pam.kirby

Fri May 21, 12:38 PM

I haven't gotten any
response to my email about
supplemental materials
approval

Pat - received a response
to my inquiry on April 25
from michelle saying they
are working on finding an
answer

Wed May 20, 11:45 AM

"Today's world is where
teachers have at their
fingertips all kinds of
current events, daily news,



at 10:00 AM 10:00 AM 10:00 AM
New Message Cancel

To: pum Kirby

Some things fishy....

What I heard tonight is that
susi should have been
reducing our taxes all of
these years from the
interest income of the
medical insurance that was
invested where it was!

Wed, May 15, 6:01 AM

I'm very disappointed that
other gb members won't
hold dr k accountable.

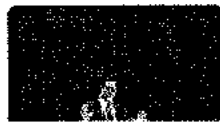



at Verizon 1:45 PM 100%
New Message Cancel

to: jason@kinky

Mon, Feb 24, 10:34 AM

Gov. Ducey announcing that
he is dedicating \$12 mil. for
the hiring of counselors over
the next 2 years! Happy
National School Counseling
Week! Love SCADM!
~A~4/20/13/14



Source: www.kinky.com

If allocated on ADM, said
typically gets 5%



100%



Subject: Kelly

Hi Kelly,
I hope you are well.

Ask michelle marshall for
the state statute and/or
board policy that requires
school boards to approve
certified contract language.
Distinguish approving the
language from approving
the issuance. Details
matter.

Best regards,
John



NEWS RELEASE

Commonwealth of Massachusetts

Department of Education

Office of the Secretary



Hi Jason 4:40 PM 55%

New Message

Cancel

To: Jason Kelly

Wed, 10/14/2015 1:17 PM

And if I'm making an
assessing effort that
opportunity does not take
into consideration nuances
of workload, capacity,
configuration and
enrollment. I wish they
went into more depth as it's
an interesting concept.

I agree on configuration and
capacity. Uses SFB which
isn't perfect. Nuances of
enrollment? Don't
understand

From: Jason Kelly



at 10:20 AM 1 of 1 Pgs 9/20/14 10:20 AM
New Message Cancel

To: John Kirby

Wed, Mar 19, 11:49 AM

"Today's world is where teachers have at their fingertips all kinds of current events, daily news, materials they bring in from all kinds of resources from all over the place. We're using the word ancillary material for those. It is not the same from one classroom to the next. Then there's everything else," the added of supplemental material." ~ Superintendent John Kirkland

That was from KW

10:20 AM 1 of 1 Pgs 9/20/14 10:20 AM

10:00 AM 10:00 AM
New Message Contact

To: Jane Kirby

Wed, May 16, 10:00 AM



Fam, Do you think its true
the district on its own can't
invest endow funds? That
they have to be put in a
trust to be able to invest?

Sent via Text Message

No, I have a theory...

I think I have it figured out

Wed, May 16, 10:00 AM



11:52 PM

5:47 PM

7:07 PM

New Message

Close

Print Mail

The issuance, details
matter.

2011-11-17, 11:52 AM



NEWS RELEASE

Department of Justice
Office of the Inspector General

FOR IMMEDIATE RELEASE

U.S. Marshals Service, U.S. District Court
in Southern District of New York

U.S. Marshals Service, U.S. District Court
in Southern District of New York

U.S. Marshals Service, U.S. District Court
in Southern District of New York

U.S. Marshals Service, U.S. District Court
in Southern District of New York

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U.S. Marshals Service, U.S. District Court
in Southern District of New York

U.S. Marshals Service, U.S. District Court
in Southern District of New York

Verizon

6:43 PM

62%
4:52 PM

New iMessage

4:52 PM

To: John Kirby

Mon, May 12, 11:04 AM

Have you asked for seena
salary from June 2018 to
her salary now to the
proposed salary in new
position?

Mon, May 12, 11:04 AM

Also-make a motion to go
into exco tomos to get legal
advice on solar panels

Tue, May 13, 10:07 AM

Damn girl! You rocked the
insurance discussion! So
proud of you!



in 1990s 1:50 PM + 0%

New Message Cancel

To: John Krip

Mon May 15 11:01 AM

I'm not as excited, but you
had a solid point last night
that statute supports.

Mon May 15 11:54 AM



Lawsuit filed against
Pasadena Elementary
School District,
officials over



**ALLYSON
BECKHAM**

**Texts
SKravetz
May 2019**

4 100% 100% 100%
New Message Contact

To: Sandy Kravitz

Fri May 10, 2:11 PM

Sorry, I can't talk right now.

I heard from Sandra. We have a scheduled meeting with Dr. Krieger to discuss the trust. Tuesday at 11 am. Can you make it? If not, what time is good for you? I believe this is in response to my most recent email. second request for a meeting before the board meeting 10pm. A

I will be there!



14 14:00 3:14 PM 75%
New Message Cancel

To: Sandy Kivetz

Before I ask about the savings comparison between Valley Schools Trust and Kalros and am going to go back and check to make sure that Kalros didn't already provide us with that info.

I will call you

To: May 3, 2014

Before I ask about the savings comparison between Valley Schools Trust and Kalros and am going to go back and check to make sure that Kalros didn't already provide us with that info.

I will call you

14 14:00

75%

Hi Sandy

2:09 PM

1:54 PM

New Message

Cancel

Hi Sandy Kirsch

Thu, May 30, 2014

Do you have the Insurance
trust Wells Fargo account
statements for June 2016
and 2017? I have Schwab
for those years. If not, I'll
ask Tyler Moore.

I picked up my Copper
Ridge packet yesterday. I
read through half and am
finishing the rest now.

Wed, Jun 3, 2014

I'll call you when I leave The
Chop Shop in 10 minutes.



12:34 PM 50%
New Message (2/2)

To: Sandy Kivvitz

Fri, May 3, 2017

Your VM mailbox is full. The admin and professional fees are most likely fees charged by Alliance and AZ Risk Retention Trust for management. I'll inquire. I also wonder why admin fees decreased but prof. Services decreased in 2017?

Unfortunately my phone vm is acting up. I've cleared it and it still says full @

yes! But you are right about those fees. Can you ask what the admin fees have

12:34 PM 50%

**Allyson
Beckham**

**Texts
Kim
Hartmann**

To: Kim Hartmann

May 17, 2018, 3:04 PM

Hi. I'm out of town till Tuesday. Are you by chance meeting with dr. Kriekard before the bond meeting Tuesday? I can call him tomorrow and talk about my issues with the meeting. Do you think it's a good idea or do you think he knows the issues?

Me too. I'd offer. Might as well give him a head start.

I will call him tomorrow then

To: Kim Hartmann

May 26, 2018, 8:03 AM

Please look over the substitute teacher proposal. I would like the board to discuss for the budget on the 29th.

Yep. Is 5 enough? I've asked jk to let us know what it takes to get us from the middle to the top. Thoughts?

To: Kim Hartmann

May 26, 2018, 10:12 AM

No I don't think \$5 is enough. I would do as much as we can afford. And plan for another increase next year (if the budget doesn't get them up to 2011 level). I was appalled they were cut in 2011 and forgotten. I briefly spoke with Doug Virgil at Arcadia graduation. When he made the recommendation he had not seen Nelson proposal. Doug said he didn't receive the proposal. So it must not

To: Kim Hartmann

Fri, Oct 5, 8:57 AM

GM. If you are interested in talking more about AE report and building a better product, let me know.

Good morning. I'm sorry I'm not good with acronyms. What is AE report?

Applied economics

Thank you. Yes. I was pleasantly surprised by some of the data and reports. What are you

To: Kim Hartmann

Mon, Oct 8, 7:19 AM

Just read the emails regarding update on the 17/18 metrics. Frustrating that it takes longer than 60 days to do a 15-30 minutes update.

Yes. Can give you an update in that too :). Could thirst afternoon work for you?

Tue, Oct 9, 6:00 PM

Excellent AED questions

To: Kim Hartmann

Tue, Oct 9, 6:00 PM

Excellent AFR questions.
This feedback provides for
the basis of the future
policy discussion we
agreed to.

Wed, Oct 10, 7:48 AM

To: Kim Hartmann

Hi. Just saw the trust action item. FYI I'm not looking to be on this appointment. Just curious if the board was given a current summary of the status of the trust recently? Thanks.

I left messages for dr k. Hope to hear from him today. Did you get a chance to talk with him?

No updates. No still oot.
Back tonight.

To: Kim Hartmann

mentioned in my meeting I had with him (JK) on Wednesday. I sent it to DV on Thursday night. I hope he got it. I will double check today. DV has another concern which does need to be considered. We weren't able to talk about it given the venue: the ceremony was to begin. Then he was off Friday and Monday is a holiday. Very poor timing for such an important decision. That's why it needs to be discussed and

To: Kim Hartmann

Well I was pretty disappointed with the "Non-reactive, it's always been this way" response to the AE data. I firmly believe we have a product issue and until we fix that along with a targeted marketing effort, things will not change. The upside is I believe it can happen faster than we think w the right leadership. It's going to take a board member to lead the way though. I'd be happy to help if you are interested

To: Kim Hartmann

Thu, Nov 29, 6:23 PM

FYI. Met e Michelle and jk today about supernatural eval process policy and tool. Excellent progress and outcome.

Tue, Dec 4, 8:05 AM

**Allyson
Beckham**

**Texts
Sandy
Kravetz &
Pam Kirby**

Verizon

6:58 PM

44%

New iMessage

Cancel

To: Pam & Sandy

Thu, Feb 7, 4:26 AM

Pam Kirby



Move It: Educators encouraged by early results of Arizona recess law • Arizona Mirror
azmirror.com

I think it is worth double checking that susd is compliant with this law without reducing



iMessage



Verizon

6:59 PM

44%

New iMessage

Cancel

To: Pam & Sandy

I think it is worth double checking that susd is compliant with this law without reducing instructional minutes. If not compliant then time may need to be added to the day. If I remember correctly SUSD MIGHT have an issue with 4th and 5th. I'm pretty sure kinder-3rd is ok.



Thu, Feb 7, 7:24 AM

Sandy Kravetz

Thanks. I saw this on the Cronkite News site. I will



Verizon

7:01 PM

42%

New iMessage

Cancel

To: Pam & Sandy

@PaulDBoyer

Lily Altavena @lilyalta

Because of a state language



Tweet your reply

Thu, Feb 14, 1:10 PM

Pam Kirby



GET OUT THERE NOW

Vape detectors have been installed in the restrooms at Aprende Middle School in the Kyrene School District. The principal tells us vaping has become a problem on campus. We'll have more on #Fox10Phoenix at 5! #vaping



1/14/2019



Verizon

8:59 PM

44%

New iMessage

Cancel

To: Pam & Sandy

Sandy Kravetz

Thanks. I saw this on the
Cronkite News site. I will
ask but, I'm sure I'll be told
"we know what we're
doing."



Sat, Feb 9, 9:35 AM

Pam Kirby

I'm getting run around from
gadd. I asked for bank
statements of cash
accounts. Sent me excel
spreadsheet. I left off self.



iMessage



Verizon

6:59 PM

43%

New iMessage

Cancel

To: Pam & Sandy

Sat, Feb 9, 9:35 AM

Pam Kirby

I'm getting run around from gadd. I asked for bank statements of cash accounts. Sent me excel spreadsheet. Left off self-insurance and replaced with bond to get to \$50 million.

Sandy Kravetz

I haven't gotten a response to my email yet. Some of mine were being caught in the district's junk mail and Debi Spaulding had to



Send Message



Verizon

6:59 PM

43%

New iMessage

Cancel

To: Pam & Sandy

Debi Spaulding had to
release them. I will follow up
on Monday. Have you told
Michelle M. about this poor
response from Gadd.

Pam Kirby

Yes. She said gadd said it
was responsive. I said it
wasn't and reiterated my
response vs. what they sent

They don't want me to see
the bank statements or the
trust statements. That's
because between the two,
we have possibly in excess
of \$40 million.



1:1 Message



Verizon

7:00 PM

42%

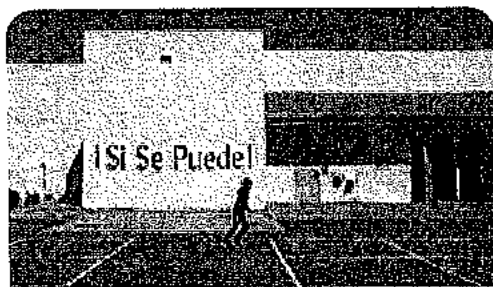
New iMessage

Cancel

To: Pam & Sandy

Mon, Feb 11, 8:57 AM

Pam Kirby



**'These kids are isolated':
Arizona lawmakers weigh how
to teach non-English speaking
students**

azcentral.com

So does this mean ESL
teachers will be rified? Half
as much time means half as
much need for teachers.



App Store



Verizon

7:01 PM

42%

New iMessage

Cancel

To: Pam & Sandy

Thanks for sharing the
article. Good point

Mon, Feb 11, 2:57 PM

Pam Kirby

That bill passed and is
waiting on the Gov
signature

In theory, susd MIGHT have
to add a few regular
classroom teachers but
since kids don't come in
packets of 30, most
classrooms should be able
to absorb



iMessage



Verizon

7:01 PM

42%

New iMessage

Cancel

To: Pam & Sandy


I wonder what the ELL
funding impact is?

Sandy Kravetz

Good questions.

Thu, Feb 14, 10:15 AM

Pam Kirby

 Lily Altavena
@lilyalta

BREAKING: per spokesman,
the governor @dougducey
has signed SB1014, rolling
back four-hour mandate for
English Language Learners,
cutting that block in half.



Messages



Verizon

7:01 PM

42%

New iMessage

Cancel

To: Pam & Sandy

@PaulDBoyer

Lily Altaventa @lilyalta

Because of a state language



Tweet your reply

Thu, Feb 14, 1:10 PM

Pam Kirby

GET THE FOX10 NEWS

Vape detectors have been installed in the restrooms at Aprende Middle School in the Kyrene School District. The principal tells us vaping has become a problem on campus. We'll have more on #Fox10Phoenix at 5! #vaping



1:10 PM



Verizon

7:01 PM

42%

New iMessage

Cancel

To: Pam & Sandy



Tweet your radio



Didn't know there was such a thing! Does SUSD have?

Sandy Kravetz

Just one of several articles I found about districts installing Vape Detectors:

Schools turn to technology to monitor e-cig usage (from @AP)

AP



Messages



Verizon

7:01 PM

42%

New iMessage

Cancel

To: Pam & Sandy

AP

Schools turn to technology to
monitor e-cig usage

apnews.com



Pam Kirby

Do you know if susd uses
these?



Sandy Kravetz



I don't. I will inquire.

How fantastic.

Thu. Feb 14. 4:39 PM



App Store



Verizon

7:02 PM

42%

New iMessage

Cancel

To: Sandy Kravetz, pam Kirby

Thu, Feb 14, 4:39 PM

Pam Kirby

Great bipartisan support for
S.B. 1184 today at the
Arizona Senate! Senators
voted unanimously, 29-0, on
Treasurer @KimberlyYeeAZ
bill that would require high
schools teach students
financial education before
they graduate. The bill now
moves to the AZ House of
Representatives.

[Tweet your reply](#)

Well, the ELL teachers may
have to find the answer!



MAIL APP



Verizon

7:02 PM

42%

New iMessage

Cancel

To: Sandy Kravetz, pam Kirby

Tweet your reply

Well, the ELL teachers may have to find the personal finance teachers. 🤔



*fund

Thu, Feb 14, 8:30 PM

Pam Kirby



Noah Kervella

In our class, we view hip-hop as an art and part of this is social activism. From its history to the words of modern-day MCs, hip-hop is rooted in activism. We study those like K. Dot and KRS in this context and let the students take it from there. #HipHopEd



Noah Kervella

Last year, we studied the intersectionality of



iMessage



Verizon

7:02 PM

42%

New iMessage

Cancel

To: Sandy Kravetz, pam Kirby



Noah Kervallis · He/Him · Kervallis · 27 Feb

In our class, we view hip-hop as an ethos and part of life is social activism. From its history to the words of modern-day MCs, hip-hop is rooted in activism. We study those like K Dot and KRS in this context and let the students take it from there scriptEd



Noah Kervallis · He/Him · Kervallis

Last year, we studied the intersectionality of Lauryn Hill's work. Then, white raps centered upon feminist issues. Several of the 8th-grade women then extended the work/consciousness into a petition against the sexism of the school dress code. scriptEd

2:18 PM - Feb 27, 2018



Libertarian Freedom of C...
@LibertarianAZ

Gov board approved



10:10 AM - Feb 27, 2018



Verizon

7:02 PM

42%

New iMessage

Cancel

To: Sandy Kravetz, pam Kirby

Gov board approved
supplemental materials?
@LESDD65 approved
curriculum? @Supt_Hoffman
@Meeech_L
@KellyTownsend11

New Front @ReporterGreen

Those tweets confirm he is a
snowflake who is only worried
about social issues than a well

Tweet your reply

This topic is gaining
momentum!



Mon, Mar 11, 8:34 AM

Pam Kirby



iMessage



Verizon

7:02 PM

42%

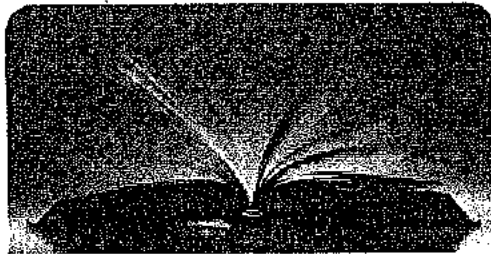
New iMessage

Cancel

To: Sandy Kravetz, pam Kirby

Mon, Mar 11, 8:34 AM

Pam Kirby



**Textbooks Alone Don't Boost
Test Scores, Study Says**

edweek.org



Fri, May 10, 9:49 AM

Pam Kirby



Algebra I



Verizon

7:02 PM

42%

New iMessage

Cancel

To: Sandy Kravetz, pam Kirby

AJUSD Works to Purge
Inequities in Payroll – AJ Gold
Canyon News
ajnews.com

Thought you guys would be
interested in this article.

Thu, May 16, 5:42 PM

Pam Kirby



iMessage



Verizon

7:02 PM

42%

New iMessage

Cancel

To: Sandy Kravetz, pam Kirby

Murky trust covers SUSD's
insurance needs

scottsdale.org

Sandy Kravetz

I saw it in the print addition.
Talk about a reactionary
headline.

Pam Kirby

I learned more from that
article than I did with 8
years of service! 🤔

Sandy Kravetz



iMessage



**BARBARA
PERLEBERG**

TEXTS

11:03

96%

< Kim Hartmann



Tuesday, October 16, 2018



Are we starting
in open session.
I'm in conference
room.

2:59 PM

Wednesday, October 17, 2018



Thanks for vmail.
Making progress!

6:39 AM

Monday, November 5, 2018

Just a reminder-
the mtg is at
Coronado today.

1:31 PM



Thank you!

1:47 PM

Tuesday, November 13, 2018



Hi barb. Who is
our technology
person?

7:32 AM

7:40 AM

Debi Spaulding



👍 thx

7:46 AM

Friday, November 16, 2018



Enter message



Tuesday, November 20, 2018



Hi. Do you know
what the 12/3
SUSD communi-
cation meeting is
about?

4:44 PM

I think you might
be referring to
sit downs we are
having 2x2x1 with
our new PIO to be
updated on her
Communications

+ | Enter message



11:03

96%

< Kim Hartmann



I think you might be referring to sit downs we are having 2x2x1 with our new PIO to be updated on her Communications plan. My meeting is on the 5th.

5:18 PM

**Jann-Michael
Greenburg**

EMAILS

RE: March 7 Study Session

Sondra Como

Thu 3/7/2019 10:53 AM

To: Jann-Michael Greenburg <jmgreenburg@susd.org>; Debi Spaulding <dspaulding@susd.org>; Patty Beckman <pbeckman@susd.org>;

Cc: Kyle Wattie <KWattie@susd.org>; Paul Goldstein <paul.goldstein@susd.org>;

Hi Jann:

See my answers below in red. Hope I answered all of your questions. If you have any other questions, please let me know. Thanks.

**Sondra Como | Executive Administrative Coord.
Superintendent/Governing Board
(480) 484-6238**



From: Jann-Michael Greenburg <jmgreenburg@susd.org>

Sent: Thursday, March 7, 2019 8:28 AM

To: Debi Spaulding <dspaulding@susd.org>; Patty Beckman <pbeckman@susd.org>; Sondra Como <scomo@susd.org>

Cc: Kyle Wattie <KWattie@susd.org>; Paul Goldstein <paul.goldstein@susd.org>

Subject: Re: March 7 Study Session

Couple quick questions/comments for you guys for tonight's meeting:

(1) If I want to speak, is there something I do on my end or should I wait until Patty asks after my colleagues have spoken something like "Jann, do you have any comments?" Board President will ask if you have any comments.

(2) What happens if my phone gets dropped? Is there a number I should use to join back into the meeting? Paul or Kyle should have a phone number for you to call if that happens.

Quick comment: My seminar ends exactly at 3PM. So, if we could wait 3 minutes after then to start the meeting and do roll call that would be Greatly appreciated. I will mention this to Patty Beckman. Usually, the person calling in is announced by IT when they join the meeting (after

7/10/2019

roll call) and acknowledged by Board President. I will also note the time you join in the meeting if it is after roll call.

Sorry - this course's timing was... not good.

Jann-Michael Greenburg

Member I SUSD Governing Board

Scottsdale Unified School District

----- Rabbit Road, Scottsdale, AZ 85250



7/10/2019

RE: Personnel matter - Jann-Michael Greenburg

RE: Personnel matter

Patty Beckman

Wed 5/1/2019 1:36 PM

To: Jann-Michael Greenburg <jimgreenburg@susd.org>;

Thanks for sending this Jann. I appreciate you keeping me informed.

Patty



Patty
Beckman |
Governing
Board
President
Scottsdale
Unified
School
District
8500 E.
Jackrabbit
Rd.
Scottsdale,
AZ 85250 |
tel (480)
484-6238

[Website](#)
| [Map](#) |
[Governing
Board](#)



From: Jann-Michael Greenburg <jimgreenburg@susd.org>
Sent: Monday, April 29, 2019 7:18 AM
To: Patty Beckman <pbeckman@susd.org>
Subject: Fw: Personnel matter

7/10/2019

RE: Personnel matter - Jann-Michael Greenburg

Patty,

I sent the attached letter to Dr. K last week (see e-mail below). He reviewed it and passed it on to "General Counsel," which I assume to be Michelle.

I wanted you to read through it when you have time so that if this comes up with Dr. K you understand why. I'd also be curious to know what your own thoughts are about what I have written.

All the best,

Jann-Michael Greenburg
Member | SUSD Governing Board
Scottsdale Unified School District
8500 E Jackrabbit Road, Scottsdale, AZ 85250

Re: Policy GBEF Discussion

Jann-Michael Greenburg

Tue 3/19/2019 12:56 PM

To: John Kriekard <jkriekard@susd.org>; Patty Beckman <pbeckman@susd.org>;

No, I know. And I've just thrown a wrench in that efficiency on short notice like a jerk, so apologies for that.

KHB has language which I failed to properly recognize last time and am not sure has been fully thought through, and GBEF's language is largely fine, but I do want to clarify my understanding of certain aspects of it. The deletion of policies, and animals updates, are all fine with me. My focus is mainly on KHB and GBEF.

Jann-Michael Greenburg

Member | SUSD Governing Board

Scottsdale Unified School District

8500 E Jackrabbit Road, Scottsdale, AZ 85250

From: John Kriekard

Sent: Tuesday, March 19, 2019 1:53 PM

To: Jann-Michael Greenburg; Patty Beckman

Subject: RE: Policy GBEF Discussion

We can do that, but we put items on the consent agenda because they were discussed at the last meeting and there have no questions. We are trying to make our meetings more efficient. As I said about GBEF, without Michelle here, we should just table the item and you can get your answers from Michelle in the meantime, and then we'll resubmit them next month.



Dr. John Kriekard
Superintendent
Scottsdale Unified School District
Mohave District Annex
8500 E. Jackrabbit Rd., Scottsdale, AZ 85250
Office 480.484.6120
Cell 602.717.4712

[Website](#) | [Map](#) | [SUSD Magazine](#)



From: Jann-Michael Greenburg <jmgreenburg@susd.org>
Sent: Tuesday, March 19, 2019 10:30 AM
To: John Kriekard <jkriekard@susd.org>; Patty Beckman <pbeckman@susd.org>
Subject: Re: Policy GBEF Discussion

And I will want to discuss KHB as well again. Sorry - this past week has been horribly busy and my head has been all over the place.

Jann-Michael Greenburg
Member I SUSD Governing Board
Scottsdale Unified School District
8500 E Jackrabbit Road, Scottsdale, AZ 85250

From: Jann-Michael Greenburg
Sent: Monday, March 18, 2019 7:00 PM
To: John Kriekard; Patty Beckman
Subject: Re: Policy GBEF Discussion

John and Patty,

I apologize for the very late notice, but I would like to pull the Policy GBEF discussion from the consent agenda tomorrow and potentially have a discussion about its provisions and a separate vote.

I just wanted to make you both aware of this so that I am not surprising anyone should I (or perhaps other Board Members) ask for this.

All the best,

Jann-Michael Greenburg
Member I SUSD Governing Board
Scottsdale Unified School District
8500 E Jackrabbit Road, Scottsdale, AZ 85250

1/22/19, 8:25 AM

Okay

Jann the good news is, I have every reason to believe the common change thoughts that you and I share (that was discussed at events during our campaign) shouldn't be difficult to implement. So far- except today's issue- its going well. Get rest and feel better

1/22/19, 9:15 PM

Agreed 100%. And Allyson and I have always worked well professionally. I agree and I'm happy that we will be able to target a lot of these issues with a solid front. Great job today as usual and see you soon.

2/10/19, 5:07 PM

Hey, as Queen of the Schedule, any word on where we are with SEA recognition; new policy introduction?

Didn't want to annoy Dr K if it's something that's already been discussed between you two!!

I have brought it up to him. He said he is working with the SEA and Kris to get that % verification over 50%.

I am meeting with Kris week after next to get her thoughts.

I am hoping to get traction on this soon. But I do think we need to have solid argument- or the other 3 will vote us down and then it won't be raised again for awhile.

I want to get it right the first time. Thoughts?

I have not discussed this with anyone else.

I've told him I'm against it, personally for a number of reasons.

I've told him I'm against it personally (has numbers of 49%)

Mr. Now if it he believes the other board members are so against it that the public should know by holding a vote on it.

It could be a year by his estimate.

Good point.

if we wait for 50%

And then we get into arbitrariness.

Oh jeesh! I was thinking before school year end.

Do we suddenly scrap it because they hit 49% membership?

No no. He said it wouldn't be for a while.

Like next year basically.

The problem with that is also then what happens if they drop to 47%
- do we go back?

At least, that was my understanding. This was early January, so perhaps it's changed.

Yes that was my point. It is arbitrary.

If you suddenly hit 49%, do we stop speaking to them?

They DO NOT want to release numbers. We should do another survey. Just for this maybe. % is also tuff because some new teachers dont join only because they cannot afford it.

Yes. There are a lot of issues with it.

For one thing, not even our President has to have 50% of the vote to win.

He's not doing it cause he doesn't like the SEA mind you. It's a call about chances for success. But if we set a precedent like this I believe there are serious problems that may be encountered in the future.

You think Kriekard doesn't like the SEA? Hmm I didn't get that impression. I thought his hands were tied with the board.

Oh I just reread

No. That's not what I said Hahahaha

Sorry ignore...im actually going over his contract and birdwells!

3/19/19, 10:19 AM

I could be wrong, but since they are all listed under a single action item we have to pull all of it and not just one portion of it

Yes. But I am not sure if I have to pull each up for discussion or I can say specifically GBEF... I will find out. Thanks!! See u tonight!

Wtf

Was this opening paragraph in KHB always there?

I don't remember that wording.

I know right?? I am looking at it again and it feels "Red4Ed"

4/22/19, 9:20 PM

Patty, could you forward me the email you received concerning the community meeting for Hoho and Yava?

Rose just mentioned it to me and it is the first time I have heard about it.

And now I'm heading out of town.

The Yavapai one tomorrow?

Yes

K

The emails from Sandra don't even mention it.



Scottsdale ~~Unified~~ School District

Ensuring All Individual Learners Reach Their Full Potential

April 17, 2019

Dear Hohokam Staff, Parents, and Community,

Thank you for your attendance, questions, comments, and input at our community meetings regarding the possible rebuild and temporary move of Hohokam to Yavapai's campus. Your input will aid the Transition Planning Committee in addressing the various needs and programs that add to the unique culture of each school.

I am excited to share that the SUSD Governing Board approved Hohokam's rebuild at yesterday's Governing Board meeting. With this approval, we will now begin to plan the transition. All Hohokam and Yavapai community members are invited to a meeting next Tuesday, April 23rd at 5:30 PM in the Thunderbird Hall at Yavapai Elementary School (701 N. Miller Rd, Scottsdale). The number one question asked at our community meetings was concerning student uniforms/dress. With this in mind, we will include a presentation on the benefits and challenges of student uniforms during this community meeting. Additionally, we will share an update for transitioning Hohokam to Yavapai's campus and outline the process for selecting the Transition Planning Committee members. Following this meeting and presentation, we will engage both school communities to help determine a direction for student uniforms.

Sincerely,

Chuck Rantala
Principal

chuck rantala
principal

I never received that.

How did you get it?

I got it from a parent. [redacted] Chuck the Principal sent it to families. I don't think it is really for us. But she asked me to go.

Well, I'll email EMO and let them know I can't come. Could you please apologize profusely on my behalf. I'd have joined you if I had a choice.

Of course. Everyone knows you are on the right side... and care about Hohokam and Yavapai.

I mean, I think you've got the brownie points right now. I just think Yava is bad as it is currently constituted. Tonalea closure was a horrific idea.

But we'll have to have a meeting with Dr K to discuss Coronado Complex because it's flagging.

To: Allyson Beckham

Details

Message with [REDACTED]
1/21/19, 10:13 AM

[REDACTED]

Jann-Michael Greenburg

Texts

Allison Beckham

Patty Beckman

To: Allyson Beckham

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I am meeting with Kris week after next to get her thoughts.

I am hoping to get traction on this soon. But I do think we need to have solid argument- or the other 3 will vote us down and then it won't be raised again for awhile.

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You think Kriekard doesn't like the SEA? Hmm I didn't get that impression. I thought his hands were tied with the board.

[REDACTED]

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Of course. Everyone knows you are on the right side... and care about Hohokam and Yavapai.

I mean, I think you've got the brownie points right now. I just think Yava is lost as it is currently constituted. Tonalea closure was a horrific idea.

But we'll have to have a meeting with Dr K to discuss Coronado Complex because it's flagging.

**Patty
Beckman**

**Texts
Jann-Michael
Greenburg**

11:11



Jann-Michael >



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Mon, Apr 22, 9:20 PM

Patty, could you forward me the email you received concerning the community meeting for Hoho and Yava?

Don't just mention it

11:06



Jann-Michael >

Tue, Jan 22, 8:25 AM



Tue, Jan 22, 7:55 PM

Thanks again for redirecting the convo again. I was really perplexed that this has been the 3rd meeting in a row that they've brought up these issues with roundabout comments, and they did it to a guy who had no idea what was going on and nearly derailed his

and nearly derailed his
plans.

11:10



Jann-Michael >

[REDACTED]

[REDACTED]

[REDACTED]

Tue, Mar 19, 10:19 AM

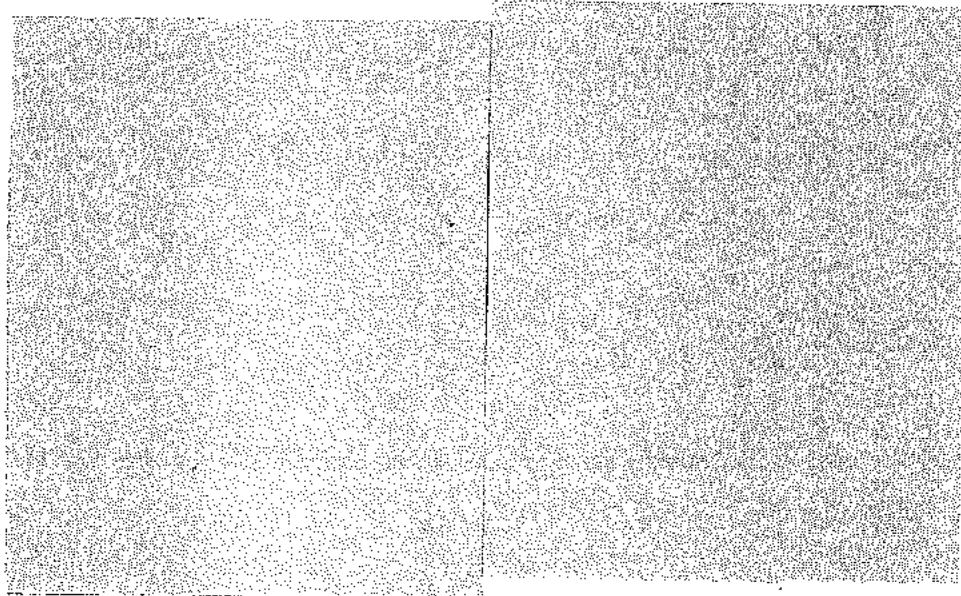
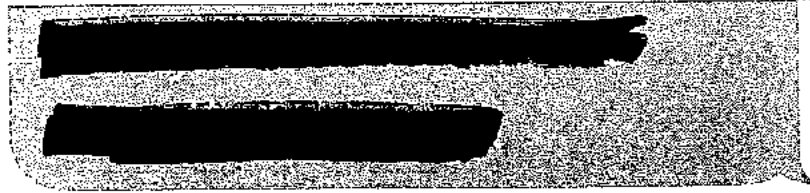
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11:12



Jann-Michael >



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Yava is lost as it is currently constituted. Tonalea closure was a horrific idea.

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Sat, May 4, 8:14 PM

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I mean, I think you've



Jann-Michael >

recognition; new policy
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11:08



Jann-Michael >

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Good point.

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And then we get into arbitrariness.

Oh jeesh! I was thinking before school year end.

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Jann-Michael >

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Jann-Michael >

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Jann-Michael >

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You think Kriekard doesn't like the SEA? Hmm I didn't get that impression. I thought his hands were tied with the board.

Oh I just reread

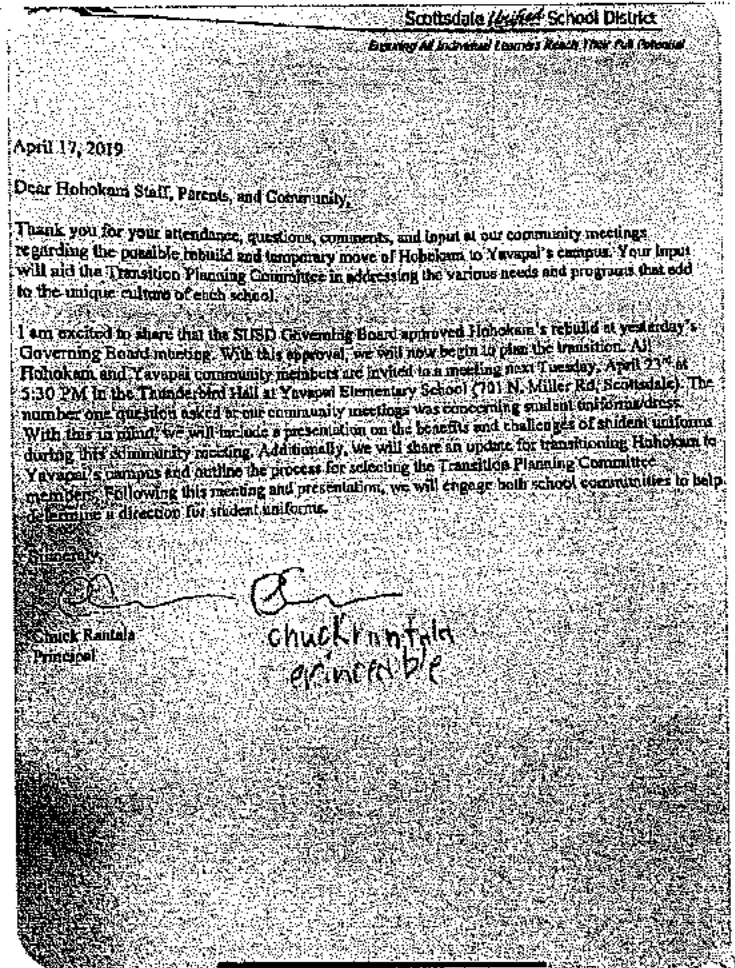
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Chuck the Principal sent it to families. I don't think it is really for us. But she

Rose just mentioned it to me and it is the first time I have heard about it.

The Yavapai one tomorrow?

Yes

K

**Patty
Beckman**

**Texts
Allyson
Beckham**

To: Beckham Allyson

Sat, Jan 19, 8:02 AM

Good Morning, thank you for such an informative get together yesterday. I enjoyed it immensely. I thought you may want to look at the gifted newsletter, if you haven't seen it. Sometime, I do want to meet with Ms. Wong as I



Downloaded from



To: Beckham Allyson

meet with Ms. Wong as I
have a few questions as
it relates to testing.

I will get you the
Desegregation budget
allocation report today.
Patty

Thank you for sending.
Quick question. When
my kids were in school
gifted testing was
optional. Do you know
when and why they
made it mandatory for 2
nd graders? Enjoyed
meeting with you too.

To: Beckham Allyson

That is one of my questions. Also we used to test 2 grades above, we now do it at grade level.

IMO the goal isnt to "grow" gifted. You either are or you are not. The goal should be to identify students earlier and more accurately.

But I would like to meet with Ms. Wong to understand.

Our gifted numbers jumped from last year to this year.



Beckham Allyson



To: Beckham Allyson

Fri, Jan 4, 1:07 PM

Wed, Jan 16, 3:27 PM

Hi. I have the book the
The Advantage for you
and can drop it off at
your house. Amazon
only had one copy left.
I'm going to ask Michael
Lorsch if he has a copy
for Jann- Michael If
that's okay what is your

To: Beckham Allyson

Sat, Jan 19, 10:24 AM

Just read the deseg
issue brief. My
previous understanding
was that az can take
away deseg at any time.
However this statement
makes it sound like it will
continue as long as
certain criteria is met. Is
that how you read it?
Do you know if it az
Dept of Ed that
evaluates the program
or another state
agency? Or who would
be the entity to take the
funding over?

To: Beckham Allyson

funding away?

Didn't see your first email. Which outlines the state statutes and and answers my questions to you.

I don't recall seeing this document before. I'm going to check my records. Wondering if the item is on consent.

The state has been trying to take away deseg for along time. I believe (will check) there is only 16 or so

To: Beckham Allyson

there is only 16 or so districts that receive it. It is a special tax "inside" the tax rate just like adjacent ways. It has historically been \$7M ish a year. I know you are aware of all of this- sorry for the recap.

It is based on qualifying students. This is why we do need to make sure it is spent appropriately or we will give them a reason to go after it. We spent quite a bit on PD last year and

To: Beckham Allyson

PD last year and
Coronado pretty much
doubled.
We put together this
info from public records.
Gadd verified Coronado
for me.

Good Morning Mr. Gadd,

I have a question I am hoping you can answer.
Recently I reviewed some numbers regarding
desegregation funding in SUSD. This topic
recently came up, as a question, at a recent board
candidate forum.

I would like to make sure my understanding of the
numbers (received via public records request) is in
fact, accurate.

For Coronado High School:

2016/2017 Deseg total expense was \$547,542-for
M&O only + 67 k for Capital / Total 610 K

2017/2018 Deseg budgeted amount is

\$1,022,303- Budget is 1.2 m, Expenditure are 1.4
m

The potential gain over last year's actual being

\$474,761-Net 16/17 Expenditures to 17/18

Expenditures are approximately 800,000

I did misspeak and say that we "spent" \$1M from
Deseg on Coronado when it is my understanding
that is the *budgeted amount*. Can you confirm if

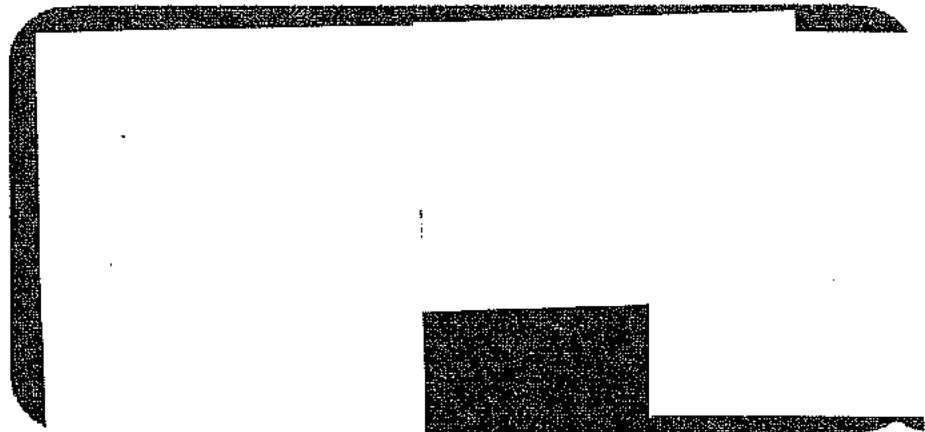


To: Beckham Allyson

Deseg on Coronado when it is my understanding that is the *budgeted amount*. Can you confirm if the \$1M budgeted amount is correct? Do you know how much we have spent this year so far?

His responses were in red.

Mon, Jan 21, 2:53 PM



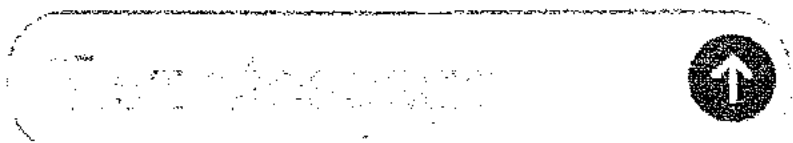
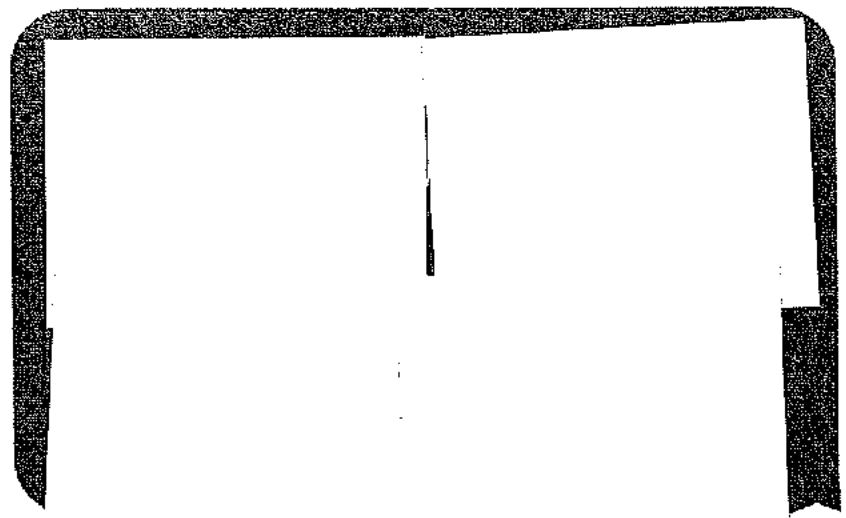
Mon, Jan 21, 9:28 PM



To: Beckham Allyson

Mon, Jan 28, 4:34 PM

Hi. Just wanted to make sure you received notice that the financial statement was delivered and can be picked up in Sondra's office.



To: Beckham Allyson

pvschools.net



They have a nice
Governing Board Page
with resources.

Wed, Jan 30, 3:01 PM

Wed, Jan 30, 6:56 PM

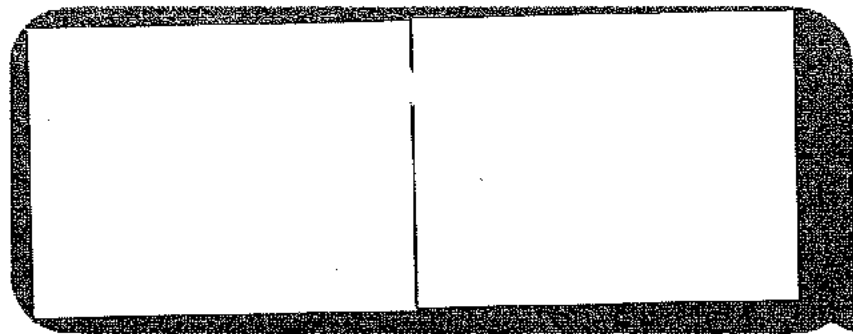


Thu, Jan 31, 7:21 PM

I read your piece in the
Pv independent tonight.
I found it positive,
informative and well
written. Thank you

To: Beckham Allyson

Thu, Feb 7, 2019



Fri, Feb 8, 7:20 PM



Scottsdale Parent Council

January 20 at 11:47 AM •

Coming soon. A Districtwide Local Wellness Policy will be created by a SUSD Wellness Committee. SUSD's Wellness Committee is in the process of formation.

SPC has been asked to identify 3 parents in our district who would be willing to be an active participant in the district's wellness committee.

PLEASE NOTE: The district committee is not the same as the SPC prevention and wellness committee. SPC is a separate and autonomous organization. SPC aims to be the united



To: Beckham Allyson

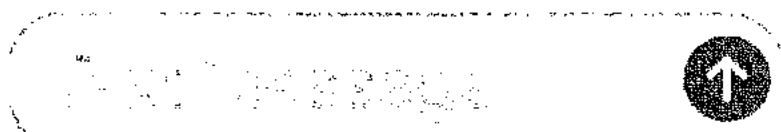
- SPC has been asked to identify 3 parents in our district who would be willing to be an active participant in the district's wellness committee.

PLEASE NOTE: The district committee is not the same as the SPC prevention and wellness committee. SPC is a separate and autonomous organization. SPC aims to be the united voice of ALL parents.

We will make information available when we have it. SPC's priority is making sure the application and selection process is fair, proactively inclusive and transparent.

SUSD does not sponsor nor endorse this our organization. Information is provided and disseminated as a community service.

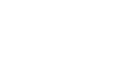
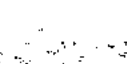
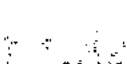
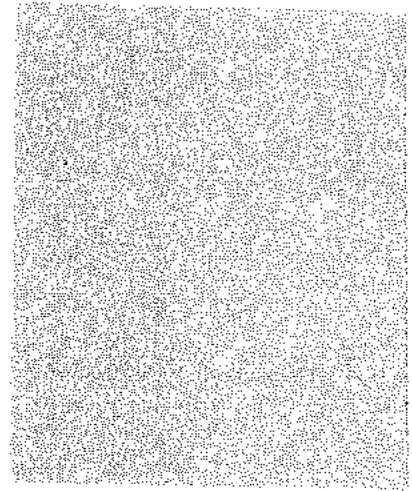
I was just asked by a community member if the board voted to form this committee. I will e-mail Dr. Kriekard, but do you have any such recollection, before I was on the board? Sorry to bother, you just answer when you can. P



To: Beckham Allyson

Fri, Feb 8, 9:55 PM

No the 2018 board did not vote on this committee. I was informed by SPC member [REDACTED] of its existence about Jan 22. And that there was an application process. Originally due Jan 24 than extended to Feb 5 (not 100% sure of that date). I can give you some background. Easier over the phone tomorrow. Night 🙏



To: Beckham Allyson

be in my office for a meeting.

I hope you accomplish a lot with Dr. Kriekard.

I would like to schedule a time with you because I would like to discuss the quarterly meetings we talked about Tuesday.

I want to make sure they are very effective and we walk away with what we need every single time.

Fri, Feb 15, 9:18 AM



Beckham Allyson

Beckham Allyson



To: Beckham Allyson

that is excludes very little space

Then adding 6000 sq ft
gyms + cafeteria space
for Elem only makes
that number look worse
when compared to other
facilities Clearly not a
true picture
comparatively speaking.



Agreed.

And FYI charters are not
required to report
capacity



Beckham Allyson



To: Beckham Allyson

can still think straight. I
wanted to say thank you
for all of your input
Allyson you do make
great points.

I felt it important to
move forward tonight
but also really
understand your
concerns. You have my
commitment to getting
the issues you and
Sandy raised addressed
and the expectation put
in place so all of us feel
comfortable.

I want to set the first
special meeting asap to
go over things with him.



Good & Beautiful



To: Beckham Allyson

Fri, Feb 15, 9:18 AM

Let me know if you
would like to tour
Laguna with me on
Friday March 8th

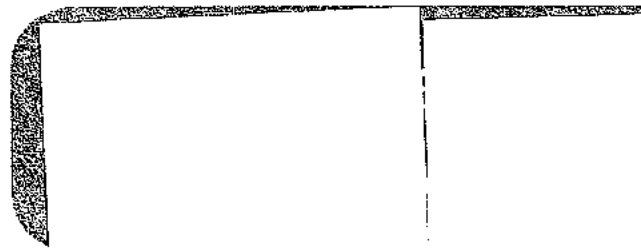
Fri, Feb 15, 12:01 PM

Sun, Feb 17, 3:00 PM

I was just told SFB does
NOT exclude things like
the gym and cafeteria.
That is excludes very



To: Beckham Allyson



Wed, Feb 27, 1:02 PM

You mentioned meetings. Are you free tomorrow at 2. I'm meeting with dr k and would like you to join.

Let me see if I can move a meeting.

I am actually going over the agenda with him at

To: Beckham Allyson

Yes. Thank you. Let's
put together an agenda
so we are efficient with
time.

Yes- he asked that we
have questions
prepared- even in
advance if possible.
Mine are fairly generic
but I will get them
together.

Tue, Mar 5, 1:46 PM



Beckham Allyson



To: Beckham Allyson

the agenda with him at
4 tomorrow.

Wed, Feb 27, 4:06 PM



Thu, Feb 28, 9:10 AM

Hi Allyson. I can join you
at 2:30. If that would be
disruptive let me know.
I have an appt with Dr.K
at 4 already to go over
the agenda.



Text Message



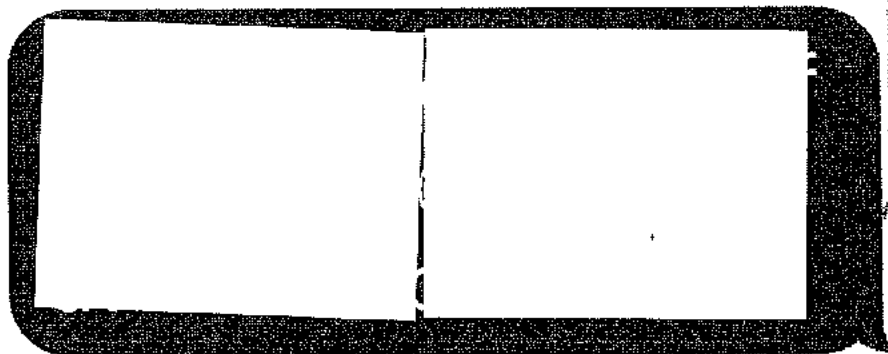
To: Beckham Allyson

Fri, Mar 8, 5:11 PM

e calendar for next year's board meeting
s by another week. Having only five da
is too hectic. I have attached her draft
ings, I believe that we violated good pr
om the Consent agenda after the agenda
ave items removed before the agenda

I am reading Dr Ks
memo. I am going to get
clarity on this as it is the
opposite of what I was
told and told you.

Sun, Mar 10, 7:28 PM



To: Beckham Allyson

Mon, Mar 11, 2:05 PM

Wed, Mar 20, 6:26 PM

Hi-

Ibi just sent this. I am going to try and go. She asked me to forward to you and Sandy.

Can you forward to Sandy- I do not have her info.



Thank you for your help.



To: Beckham Allyson

Thu, Mar 21, 2:35 PM

Have you heard about
something going on at
Copper Ridge?
I just emailed Amy/
Kriekard.

To: Beckham Allyson

Hi Patti, this is Ibi
Haghighat. I've made
arrangements to visit
James W Rice
Elementary tomorrow
located at 4530 West
Campbell Ave. Phoenix
AZ from 10:00 to 11:00.
I only have your contact
number. I email the
information to Sandy
and Allyson as well.
Thank you in advance
for passing along the
information. I hope you
are able to confirm with
me just in case the
email doesn't reach



Yours sincerely,



To: Beckham Allyson

weekly call) we spoke quickly and he told me that he spoke with Gadd and it was not true. He said he would be reaching out to you as well. It was late so I am positive he will speak with you Monday.

Thank you for letting me know.

Of course sorry I didn't get back to you sooner. I would like it explained again because honestly I was driving- so I would like to write it down



1 Your Messages



Thu, May 9, 1:13 PM

Do you have any
questions regarding
ASBA inquiry today?



Find App Store



To: Beckham Allyson

I was driving- so I would like to write it down.

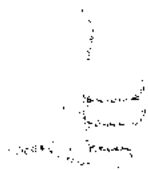
You were very timely. I would have thought he would have contacted me. I look forward to his response.

ue, Apr 16, 6:53 AM

To: Beckham Allyson

ASBA inquiry today?

Not specific. It seems we are to go over our priorities and submit them? Since it is a discussion item. I was going to hear it discussed and then ask if need be. But thanks for checking!



Wed, May 29, 8:30 AM

Good morning. I believe
you said you requested



To: Beckham Allyson

Good morning. I believe you said you requested the SUSD bond and override portion of the website be kept current. I went to the website yesterday and Didn't see any changes. Do you know if they are planning on keeping it current?

I had a long talk with JK about that yesterday. I also spent considerable time on pointing out that the finance drop down makes ZERO sense and

To: Beckham Allyson

I had a long talk with JK about that yesterday. I also spent considerable time on pointing out that the finance drop down makes ZERO sense and that we have finance info all over the website. I told him (and emailed) stating that I would like to see Finance as a visible tab on the home page along the horizontal tool bar. Under it needs to be **EVERYTHING** including and updated bond spending page that also



To: Beckham Allyson

spending page that also has Navajo on it and the trust info- within trust info I would like to see:

- Trust document
- Meeting schedule/minutes
- Current statements for all 3 accounts
- List of trustees
- Cash reg policy

He told me that we let our website person go because

They hired someone new this week. I was told that my



Text Message



To: Beckham Allyson

week. I was told that my request has been forwarded to Amy Bolton to work with finance to make happen.

I will be following this for sure.

Oh and with the trust info on the website also a description of the risk retention trust vs. trust

Wed, May 29, 12:08 PM



Beckham Allyson



**Patty
Beckman**

Emails

From: Patty Beckman <pbeckman@susd.org>
Sent: Saturday, March 2, 2019 9:46 AM
To: Kim Hartmann <kimh@kchsolutions.net>
Cc: Pam Kirby <Pam.Kirby@hotmail.com>
Subject: Re: Coronado Success Initiative

Kim and Pam,

Thank you for your e-mails. They were very informative. I think we all agree that there is much work to be done with CSI.

Tuesday nights meeting was interesting. I actually applaud Principal Palatucci for her efforts. She is working incredibly hard.

Last year's AZ Merit scores when contrasted with graduation rates were alarming. I attended the board meeting when this data was presented to you. However, I do believe there are many factors that can drive a disparity such as this. We are discussing these factors currently, as well as the contract language and stipends.

Please know I thank you for your input, as I believe it to be valuable.

We are all dedicated to providing as much support as possible, and in the right direction, to make these students successful.

Patty

By the way, it does not appear that you have the correct e-mail address for Board Member Greenburg. It is jmgreenburg@susd.org.

On Thu, Feb 28, 2019 at 6:34 PM -0700, "Kim Hartmann" <kimh@kchsolutions.net> wrote:

Dr. Kriekard and Board,

I am concerned we are losing the essence and intent of CSI. It was initially intended as an academic turnaround. The AZMerit scores reflect the story and still need to be the focus. When we began the initiative two years ago, we also did a student and teacher efficacy self-assessment with the Kolbe index. At that time, the important take-away was that our CHS students actually had very high self-efficacy, meaning they saw themselves with high potential to achieve. I sincerely believe this is an academic rigor challenge not an SEL (social-emotional learning) challenge.

Having said that, I believe there are three immediate and urgent next steps.

- 1) Dedicated Experienced Turnaround Leadership - It needs to be clear who owns the K-8 and 9-12 turnaround effort? Do they have experience in this type of effort? I believe, it needs to be in addition to the leadership (principals) that are responsible for the day-to-day efforts. Of course, they need to be closely coordinated, however, this is a BIG full-time effort. This is why we originally identified the role of Administrator on Assignment to own this responsibility. I realize there is work being done in this area, however, it needs to be officially announced and we need to ensure this person(s) has the proper bandwidth and experience for the job.
- 2) Data Driven – this effort needs to be data driven. We need to utilize targeted AZMerit data (or equivalent and regardless what the state decides to do) and declare a 1, 3 and 5 year goals by grade level. I guarantee we will not see improvement unless we measure consistent results year over year with a longer term goal. We have not declared this yet. We have terrific baseline data for FY 2017/18 or FY 2018/19. Just pick one. Then declare short and long term targeted goals.
- 3) Teacher Stipends – We need to use this money wisely and optimally. This is nearly \$420,000 (~60 teachers * 7000 each). This is intended to compensate for above and beyond effort. This should be tied to academic inputs and outputs, i.e. specific student (before, after and during school hour) supports, academic RISE hour, PD outside of typical PD. We need to be much more strategic with these dollars. For example, if we have an 18% student AZMerit mass pass rate, I'd suggest we have 82% students in need of math support. What does this take to correct this? How many additional math classes, math teachers does this require? Can we create an additional class hour in the day? Would this be more effective than the current RISE hour? Can we attract/compensate math teachers from across the district for one hour of math? These are the type of questions and answers that need to be addressed before teacher contracts are issued or we will lose another year. Our students deserve more.

We've made some great progress. We now need to lift this effort to a new level of accountability, measurement and out-of-the-box thinking. Same efforts will get the same results. I continue to be an advocate of SUSD, the CHS community, our students and I am here to help in any way I can.

Thank you for your service,
Very best,
Kim

From: Pam Kirby <Pam.Kirby@hotmail.com>
Sent: Wednesday, February 27, 2019 8:42 AM
To: Allyson Beckham <abeckham@susd.org>; Barbara Perleberg <bperleberg@susd.org>; Sandy Kravetz <skravetz@susd.org>; pbeckman@susd.org; jgreenberg@susd
Cc: Kim Hartmann <kimh@kchsolutions.net>
Subject: Coronado Success Initiative

Good morning Governing Board,

I watched the board meeting last night and was immensely disappointed with the CSI proposal. Coronado High School has a graduation rate of 82% yet the pass rate on AZMerit ELA and Math are 15% and 18% respectively. Let that sink in. The students are simply being pushed through the system, year after year.

The CSI discussion was rooted in "social-emotional needs" and "connecting kids to the school". Why does administration believe students aren't engaged in their learning? What facts do they have to back that up?

It occurred to me to review the questions Hanover used to measure student engagement on the recent Climate Survey. **The results of my 60 second review are attached. It is admittedly cursory and incomplete but certainly suggests there is reason to dig further.**

I would encourage the Board to study the Climate Survey, by school, to determine if there are any outliers with the Coronado responses as compared to the rest of the high schools. Or, ask administration to study the survey and present that data to defend a new CSI proposal.

The Board hasn't seen any meaningful use of the climate survey data since November. At the time Hanover presented it, the Board was told each individual school would use the data in their continuous improvement plans. Aren't you somewhat evaluating Coronado's Continuous Improvement Plan right now? What better time to use the survey as a tool to implement thoughtful change?

If it means taking a few months to develop a thoughtful proposal and adding a contract addendum in June with the defined responsibilities, then it will be worth it. If teachers don't want to fulfill the new responsibilities at that time, then waive the liquidated damages for

them and release them from their contract. Or, you may find, there is a completely different, more impactful use for the thousands of dollars being spent as part of CSI and you don't need an addendum at all.

We didn't have the benefit of the Climate Study when we rolled CSI. We do now. Don't waste it.

Thank you for your service and your time,
Pam

**Sandy
Kravetz**

Emails

John,

I would like to propose that we place a discussion about waiving attorney-client privilege for any discussions concerning the subject of my July 26, 2019 request for information on a future agenda.

Thanks,

Jann-Michael Greenburg
Member | SUSD Governing Board
Scottsdale Unified School District
8500 E Jackrabbit Road, Scottsdale, AZ 85250

From: Allyson Beckham <abeckham@susd.org>
Sent: Wednesday, February 6, 2019 8:37 AM
To: John Kriekard <jkriekard@susd.org>
Cc: Michelle Marshall <mmarshall@susd.org>; Sandy Kravetz <skravetz@susd.org>
Subject: Self-Insurance Trust recommendation

Dear Dr. Kriekard,

I am very interested in learning more about Mr. Gadd's recommendation for a change in the oversight of the Self-Insurance Trust. I have read the by-laws and meeting minutes from May 2018 provided by Michelle Marshall and the memo written by Mr. Gadd. A week ago Wednesday, I requested the audited financial statements and expenditure reports for the last several years and the name of the current committee chair and background on two of the committee members I was unfamiliar with. I am still waiting on this information. (See my email for more details) I would like to add to my request the meeting minutes from last week's meeting.

Please let me know when we can meet to discuss Mr. Gadd's recommendation.

I would like to also receive clarification on why the medical or healthcare discussion is lumped into the Self-Insurance Trust discussion when according to the by-laws of the above Self-Insurance Trust doesn't include the medical insurance. As long as I have been on the Board decisions regarding the healthcare (medical) self-insurance program has been separate. For some background I have provided my experience:

On April 20, 2017 the GB approved a change in Employee Health Insurance Vender from Valley Schools Employee Benefits Trust and United Healthcare to Kairos Health Arizona Inc. with Blue Cross Blue Shield as provider and Aston Tiffany as the administer.

On April 3, 2018 the GB approved increased healthcare benefits and a 6% rate increase to be primarily paid by SUSD not the employee for employee health insurance. The district's healthcare is one of the most beneficial and cost effective from an employee perspective I have seen.

I look forward to the discussion on healthcare and request that it be kept separate from the other Insurance Trust as it administered and managed separately. If I have been misinformed please let me know.

Since, the healthcare insurance has been brought up I would like to request an update on the financial performance of the Investment account and Trust, especially since the GB is entering its third review of next year's budget. It is my understanding the district receives an annual and monthly statements from Aston Tiffany on the district's healthcare performance. Last year, I requested a copy of the annual and current monthly report and to my knowledge these reports haven't been provided.

I look forward to learning more about the recommendation.

Thank you,

Allyson Beckham

Begin forwarded message:

From: Allyson Beckham <abeckham@susd.org>

Subject: Fw: The Trust

Date: June 5, 2019 at 9:35:40 AM MST

To: Sandy Kravetz <skravetz@susd.org>

I just realized you weren't on this email. I left Dr. Kriekard a voice message a few minutes ago. I do not feel Mr. Gadd has answered my questions below. I asked Dr. Kriekard to help with the communication between myself and Mr. Gadd.

The easiest one to explain is the request for all the bank, investment statements. We have only received a thumb drive with one account statement up till 12/2018. If and when you get any other statements please let me know.

Allyson

From: John Kriekard

Sent: Thursday, May 30, 2019 5:24 PM

To: Allyson Beckham

Subject: FW: The Trust

Allyson,

I received this from Jeff on May 13. Did I not send it on to you? If I didn't I apologize. Let me know if these answers are not sufficient.

John



Dr. John Kriekard
Superintendent
Scottsdale Unified School District
Mohave District Annex
8500 E. Jackrabbit Rd., Scottsdale, AZ 85250
Office 480.484.6120
Cell 602.717.4712





From: Jeffrey Gadd <jgadd@susd.org>
Sent: Monday, May 13, 2019 4:24 PM
To: John Kriekard <jkriekard@susd.org>
Subject: RE: The Trust

John,

Enclosed are the answers to Allyson's questions. - We need Trust action to approve next year insurance coverage. Please see the answers below in red.

From: Allyson Beckham <abeckham@susd.org>

Sent: Monday, May 13, 2019 9:05 AM

To: John Kriekard <jkriekard@susd.org>

Cc: Michelle Marshall <mmarshall@susd.org>; Sandy Kravetz <skravetz@susd.org>

Subject: The Trust

Dear Dr. Kriekard,

Thank you for providing time to meet before the GB meeting on Tuesday regarding the Self-Insurance Trust. I was hoping to meet on Friday or Monday before the Agenda notice was posted to the public.

I request the the Self-Insurance Trust be pulled for further discussion and clarification and not be posted to the Agenda as an Action item at this time.

Sandy Kravetz, who is a Trustee on the Self-Insurance Board, and I have been asking questions since February and had a meeting with Jeff Gadd two weeks ago on May 1. During the meeting we learned how much information and data was incomplete from Trust meeting minutes to financial statements. I strongly suggested that all GB members should be aware of this information before Action is taken in a board meeting. Mr. Gadd said that was your decision and I needed to talk with you. Since, you were unavailable the last several weeks this is the first time I will be able to talk with you. I am assuming Mr. Gadd has discussed my concerns and issues.

We provided the minutes from the Trustee Meeting from 2016 and 2017 on Friday May 10th.

Below is an example of what I have been requesting and would like to have before the district moves forward with revising the Trust. I believe all the GB members would be interested in this information before making a decision. I know Sandy Kravetz has had a difficult time getting information she has requested, some of which is included in this list.

1. Complete and accurate financial statements of the existing Trust. FY17 audited Financial Statements have been provided FY 18 audit is underway.
2. Complete and accurate understanding of the investment accounts including accurate return on the investments the past five years. (A summary was shared with Sandy and I on May 1 by the Wells Fargo advisor. Additional information was requested and should be shared with other board members.) Tom from Wells Fargo provided a wealth of information when we met on May 1st with Allyson and Sandy.
3. An actuarial account on the dollar amount that should be held in the Trust for the three different insurance programs to adequately cover costs and potential liability. (Mr. Gadd has provided some of this information.) We prorated account balances according to annual premium obligations. In other words, we matched revenue to need. We provided this information on several occasions.

4. An accurate account of the funds available from these three programs that aren't needed for expenses and potential liability and could be used for students services and programs that can be spent right now or that could be used for one-time operating expenses? (Mr. Gadd summary provides a number yet, the discussion has not taken place as to the best use of these dollars.)A 5 year projection was provided at the Board meeting on April 16th.

5. A complete understanding of the medical self-insurance program and business arrangement with Kairos and Ashton Tiffany, including available reports generated by Ashton Tiffany. (A broad explanation has been given but the data and reports have not been shared.) Allyson received an email explaining that Ashton Tiffany is a contractor hired by Kairos Trust to administer the medical program. We have attached the most recent report on medical from Aston Tiffany.

Regarding the actual Trust document: I believe the document itself is near completion pending the above information which might or might not change components of the document.

Thank you,

Allyson Beckham

KAIROS

HEALTH ARIZONA, INC.
In cooperation with the Trust

kairos -/kai-rās/ noun, a propitious moment for decision or action.

March 31, 2019

Mr. Jeffrey Gadd
Scottsdale Unified School District
7575 E. Main St.
Scottsdale, AZ 85251

Re: Kairos Investment Pool Statement

Enclosed you will find your Kairos Investment Pool statement for the period of March 1, 2019 to March 31, 2019. The Net Return for the month was 0.12% and the Compounded Annual Rate of Return was 1.59%.

Please do not hesitate to call if you have any questions at the number listed below.

Sincerely,

Jeremy Larson
Sr. Accountant

Main 602.257.9119
Tel 602.845.6115

888.331.0222 | JOIN THE MOVEMENT

Statement of Account
KAIROS HEALTH ARIZONA

SCOTTSDALE UNIFIED SCHOOL DISTRICT

From 3/01/19 to 3/31/19

	INVESTMENT FUND SUMMARY			
	KAIROS INVESTMENT POOL SHORT	KAIROS INVESTMENT POOL INTERMEDIATE	TOTAL	
Beginning Value	\$ 6,910,365.76	\$ -	\$ 6,910,365.76	
Deposits	2,645,638.50	-	2,645,638.50	
Bank Fees	(61.07)	-	(61.07)	
Investment Mgmt Fees	(1,834.22)	-	(1,834.22)	
Interest and Dividends	869.58	-	869.58	
Realized Gain/Loss	-	-	-	
Unrealized Gain/Loss	12,774.37	-	12,774.37	
Transfers	-	-	-	
Withdrawals	-	-	-	
Ending Value:	\$ 9,567,752.92	\$ -	\$ 9,567,752.92	
Net Earnings	\$ 11,748.66	\$ -	\$ 11,748.66	
Earnings Percentage	0.12%	0.00%		0.12%

Cash Equivalents are recorded at cost on the Kairos Financial Statements

Not a negotiable instrument

FINANCIAL REPORT

KAIROS HEALTH ARIZONA, INC.

Scottsdale Unified School District

March 31, 2019

KAIROS
HEALTH ARIZONA, INC.

KAIROSHEALTHAZ.ORG

KAIROS HEALTH ARIZONA, INC.
SCOTTSDALE UNIFIED SCHOOL DISTRICT
STATEMENTS OF REVENUES, EXPENSES, AND CHANGES IN SELF-FUNDED ACCOUNT
FOR THE ONE MONTH ENDED MARCH 31, 2019 AND
NINE MONTHS ENDED MARCH 31, 2019 AND 2018

	Current Month	Current Year-to-Date	Current Budget Year-to-Date	Prior Year Year-to-Date
OPERATING REVENUES				
Primary Programs	\$ 1,230,399	\$ 11,022,963	\$ 11,217,790	\$ 10,218,731
Ancillary Programs	78,701	689,929	687,582	560,651
Total Gross Contributions ³	1,309,100	11,712,892	11,905,372	10,779,382
Less Cost of Primary and Excess Insurance Relating to:				
Medical/Rx Stop Loss	50,607	449,144	450,622	372,115
Basic Life, AD&D	7,624	66,934	66,357	68,909
Fully-Insured Dental	4,027	37,909	37,836	36,583
Short-Term Disability	17,194	154,118	152,028	108,830
Vision	12,224	109,496	109,152	126,534
Supplemental Life & AD&D	16,038	150,094	179,289	151,462
Worksite Benefits	17,699	138,877	107,478	42,002
Prepaid Legal Services	1,898	16,950	16,875	13,052
Pet Insurance	2,203	18,874	18,567	17,095
Employee Assistance Programs	2,127	18,874	18,937	19,502
Total Cost of Primary and Excess Insurance	131,641	1,161,270	1,157,141	956,084
NET OPERATING REVENUES EARNED	1,177,459	10,551,622	10,748,231	9,823,298
OPERATING EXPENSES				
Medical/Rx Loss Expense Paid & Incurred	780,027	8,477,482	9,149,868	7,935,316
Dental Loss Expense Paid & Incurred	55,841	659,302	672,048	551,727
IBNR Adjustment ¹	67,917	611,250	-	1,419,853
Stop Loss Recovered	(24,670)	(457,058)	-	(609,743)
Claims Service Fees	40,496	335,664	368,514	434,805
Net Loss Expense	919,611	9,626,640	10,190,430	9,731,958
Administration Fee	14,115	125,273	125,685	99,311
TOTAL OPERATING EXPENSES	933,726	9,751,913	10,316,115	9,831,269
EXCESS OF REVENUES OVER (UNDER) EXPENSES FROM OPERATIONS	243,733	799,709	432,116	(7,971)
NON-OPERATING REVENUES ²				
Investment Income	870	78,321	-	52,474
Unrealized Gain (Loss)	12,774	20,379	-	(13,178)
Realized Gain (Loss)	-	-	-	2,644
Less: Investment Expenses	(1,895)	(12,581)	-	(11,858)
NET NON-OPERATING REVENUES	11,749	86,119	-	30,082
INCREASE (DECREASE) IN NET POSITION	255,482	885,828	\$ 432,116	\$ 22,111
SELF-FUNDED ACCOUNT, BEGINNING OF PERIOD	3,296,799	3,804,827		
Self-Funded Contributions Earned	2,645,639	11,905,373		
Self-Funded Contributions ³	(1,308,655)	(11,706,763)		
Increase in Net Position	255,482	885,828		
SELF-FUNDED ACCOUNT, END OF PERIOD	\$ 4,889,265	\$ 4,889,265		
<i>Minimum Required Self-Funded Account</i>	<i>\$ 3,968,000</i>	<i>\$ 3,968,000</i>		

¹ IBNR Adjustment is included as part of the Medical/Rx and Dental Loss Expense Paid & Incurred in the Kairos budget. The increase in IBNR for fiscal year 2018/2019 was estimated by the Kairos actuary to be \$815,000. This increase is being expensed ratably over the year. The remaining amount to be expensed for the current fiscal year is \$203,750. At June 30, 2019, an updated actuary report will be obtained. IBNR will be adjusted based on the results of the new study.

² Kairos does not record KIP investment income on the Kairos Profit & Loss Statement. As a result, Kairos does not budget for Self-funded investment income.

³ Difference from Gross Contributions and Earned Self-Funded Contributions is due to a monthly 2% Cobra Credit received from Basic.

2/1 (1999) - Awarded \$10,000 - 1st up (Lava, Fire, Green, Gold)

[illegible]

1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1029 1030 1031 1032 1033 1034 1035 1036 1037 1038 1039 1040 1041 1042 1043 1044 1045 1046 1047 1048 1049 1050 1051 1052 1053 1054 1055 1056 1057 1058 1059 1060 1061 1062 1063 1064 1065 1066 1067 1068 1069 1070 1071 1072 1073 1074 1075 1076 1077 1078 1079 1080 1081 1082 1083 1084 1085 1086 1087 1088 1089 1090 1091 1092 1093 1094 1095 1096 1097 1098 1099 1100 1101 1102 1103 1104 1105 1106 1107 1108 1109 1110 1111 1112 1113 1114 1115 1116 1117 1118 1119 1120 1121 1122 1123 1124 1125 1126 1127 1128 1129 1130 1131 1132 1133 1134 1135 1136 1137 1138 1139 1140 1141 1142 1143 1144 1145 1146 1147 1148 1149 1150 1151 1152 1153 1154 1155 1156 1157 1158 1159 1160 1161 1162 1163 1164 1165 1166 1167 1168 1169 1170 1171 1172 1173 1174 1175 1176 1177 1178 1179 1180 1181 1182 1183 1184 1185 1186 1187 1188 1189 1190 1191 1192 1193 1194 1195 1196 1197 1198 1199 1200 1201 1202 1203 1204 1205 1206 1207 1208 1209 1210 1211 1212 1213 1214 1215 1216 1217 1218 1219 1220 1221 1222 1223 1224 1225 1226 1227 1228 1229 1230 1231 1232 1233 1234 1235 1236 1237 1238 1239 1240 1241 1242 1243 1244 1245 1246 1247 1248 1249 1250 1251 1252 1253 1254 1255 1256 1257 1258 1259 1260 1261 1262 1263 1264 1265 1266 1267 1268 1269 1270 1271 1272 1273 1274 1275 1276 1277 1278 1279 1280 1281 1282 1283 1284 1285 1286 1287 1288 1289 1290 1291 1292 1293 1294 1295 1296 1297 1298 1299 1300 1301 1302 1303 1304 1305 1306 1307 1308 1309 1310 1311 1312 1313 1314 1315 1316 1317 1318 1319 1320 1321 1322 1323 1324 1325 1326 1327 1328 1329 1330 1331 1332 1333 1334 1335 1336 1337 1338 1339 1340 1341 1342 1343 1344 1345 1346 1347 1348 1349 1350 1351 1352 1353 1354 1355 1356 1357 1358 1359 1360 1361 1362 1363 1364 1365 1366 1367 1368 1369 1370 1371 1372 1373 1374 1375 1376 1377 1378 1379 1380 1381 1382 1383 1384 1385 1386 1387 1388 1389 1390 1391 1392 1393 1394 1395 1396 1397 1398 1399 1400 1401 1402 1403 1404 1405 1406 1407 1408 1409 1410 1411 1412 1413 1414 1415 1416 1417 1418 1419 1420 1421 1422 1423 1424 1425 1426 1427 1428 1429 1430 1431 1432 1433 1434 1435 1436 1437 1438 1439 1440 1441 1442 1443 1444 1445 1446 1447 1448 1449 1450 1451 1452 1453 1454 1455 1456 1457 1458 1459 1460 1461 1462 1463 1464 1465 1466 1467 1468 1469 1470 1471 1472 1473 1474 1475 1476 1477 1478 1479 1480 1481 1482 1483 1484 1485 1486 1487 1488 1489 1490 1491 1492 1493 1494 1495 1496 1497 1498 1499 1500 1501 1502 1503 1504 1505 1506 1507 1508 1509 1510 1511 1512 1513 1514 1515 1516 1517 1518 1519 1520 1521 1522 1523 1524 1525 1526 1527 1528 1529 1530 1531 1532 1533 1534 1535 1536 1537 1538 1539 1540 1541 1542 1543 1544 1545 1546 1547 1548 1549 1550 1551 1552 1553 1554 1555 1556 1557 1558 1559 1560 1561 1562 1563 1564 1565 1566 1567 1568 1569 1570 1571 1572 1573 1574 1575 1576 1577 1578 1579 1580 1581 1582 1583 1584 1585 1586 1587 1588 1589 1590 1591 1592 1593 1594 1595 1596 1597 1598 1599 1600 1601 1602 1603 1604 1605 1606 1607 1608 1609 1610 1611 1612 1613 1614 1615 1616 1617 1618 1619 1620 1621 1622 1623 1624 1625 1626 1627 1628 1629 1630 1631 1632 1633 1634 1635 1636 1637 1638 1639 1640 1641 1642 1643 1644 1645 1646 1647 1648 1649 1650 1651 1652 1653 1654 1655 1656 1657 1658 1659 1660 1661 1662 1663 1664 1665 1666 1667 1668 1669 1670 1671 1672 1673 1674 1675 1676 1677 1678 1679 1680 1681 1682 1683 1684 1685 1686 1687 1688 1689 1690 1691 1692 1693 1694 1695 1696 1697 1698 1699 1700 1701 1702 1703 1704 1705 1706 1707 1708 1709 1710 1711 1712 1713 1714 1715 1716 1717 1718 1719 1720 1721 1722 1723 1724 1725 1726 1727 1728 1729 1730 1731 1732 1733 1734 1735 1736 1737 1738 1739 1740 1741 1742 1743 1744 1745 1746 1747 1748 1749 1750 1751 1752 1753 1754 1755 1756 1757 1758 1759 1760 1761 1762 1763 1764 1765 1766 1767 1768 1769 1770 1771 1772 1773 1774 1775 1776 1777 1778 1779 1780 1781 1782 1783 1784 1785 1786 1787 1788 1789 1790 1791 1792 1793 1794 1795 1796 1797 1798 1799 1800 1801 1802 1803 1804 1805 1806 1807 1808 1809 1810 1811 1812 1813 1814 1815 1816 1817 1818 1

Case 5:98-cv-01001

Date	Invoice #
3/31/2019	21

Bill To

Scottsdale USD No. 48
7575 E. Main St.
Scottsdale, AZ 85251

PAID

Plan Description	Census	Plan Rate	Premium
PPO Employee Only	468	620.83	290,548.44
PPO Employee + Spouse/Domestic Partner	36	1,125.00	40,500.00
PPO Employee + Child(ren)	51	1,066.67	54,400.17
PPO Employee + Family	22	1,666.67	36,666.74
HDHP \$1,500 Employee Only	503	535.43738	269,325.00
HDHP \$1,500 Employee + Spouse/Domestic Partner	22	1,000.00	22,000.00
HDHP \$1,500 Employee + Child(ren)	36	950.00	34,200.00
HDHP \$1,500 Employee + Family	10	1,533.00	15,330.00
HDHP \$2,700 Employee Only	531	441.65725	234,520.00
HDHP \$2,700 Employee + Spouse/Domestic Partner	49	816.67	40,016.83
HDHP \$2,700 Employee + Child(ren)	43	775.00	33,325.00
HDHP \$2,700 Employee + Family	51	1,241.67	63,325.17
Core Dental Employee Only	564	28.00	15,792.00
Core Dental Employee + Spouse/Domestic Partner	68	53.00	3,604.00
Core Dental Employee + Child(ren)	68	59.00	4,012.00
Core Dental Employee + Family	68	101.00	6,868.00
Premier Dental Employee Only	357	48.00	17,136.00
Premier Dental Employee + Spouse/Domestic Partner	95	94.00	8,930.00
Premier Dental Employee + Child(ren)	66	107.00	7,062.00
Premier Dental Employee + Family	52	195.00	10,140.00
Voluntary Vision Employee Only	838	7.58	6,352.04
Voluntary Vision Employee + Spouse/Domestic Partner	123	15.16	1,864.68
Voluntary Vision Employee + Child(ren)	105	16.22	1,703.10
Voluntary Vision Employee + Family	81	25.92	2,099.52
Voluntary Short Term Disability	487	35.30575	17,193.90

Balance Due will be extracted from your Self-Funded account balance. If you have any questions, please do not hesitate to call Jeremy Larson at (602-845-6115) or email us at accountingKAIROS@kairoshealthaz.org.

Current Month Premium

Payments/Credits

Balance Due

Date	Invoice #
3/31/2019	21

Bill To

Scottsdale USD No. 48
7575 E. Main St.
Scottsdale, AZ 85251

PAID

Plan Description	Census	Plan Rate	Premium
Accidental Insurance Employee Only	183	12.48	2,283.84
Accidental Insurance Employee + Spouse/Domestic Partner	28	25.34	709.52
Accidental Insurance Employee + Child(ren)	41	25.81	1,058.21
Accidental Insurance Employee + Family	66	32.31	2,132.46
Critical Illness	549	10.71297	5,881.42
Hospital Indemnity Employee Only	166	14.60	2,423.60
Hospital Indemnity Employee + Spouse/Domestic Partner	26	26.96	700.96
Hospital Indemnity Employee + Child(ren)	30	22.76	682.80
Hospital Indemnity Employee + Family	52	35.12	1,826.24
Supplemental Life & AD&D Insurance	567	21.21326	12,027.92
Spouse Supplemental Life & AD&D Insurance	137	29.20788	4,001.48
Child Supplemental Life & AD&D Insurance	114	0.07667	8.74
Basic Life for Employees	2,120	2.76564	5,863.15
Basic Life for Retirees	15	2.80933	42.14
Basic Life for Superintendent and Administration	145	11.84986	1,718.23
Prepaid Legal Services Low Plan	85	7.50	637.50
Prepaid Legal Services High Plan	84	15.00	1,260.00
Fully Insured Dental	281	14.33096	4,027.00
Pet Insurance (1 Pet)	102	10.60	1,081.20
Pet Insurance (2 Pet)	36	20.20	727.20
Pet Insurance (3 Pet)	12	29.60	355.20
Pet Insurance (4 Pet)	1	38.90	38.90
Pet Insurance (5 Pet)	0	48.29	0.00

Balance Due will be extracted from your Self-Funded account balance. If you have any questions, please do not hesitate to call Jeremy Larson at (602-845-6115) or email us at accountingKAIROS@kairoshealthaz.org.

Current Month Premium

Payments/Credits

Balance Due

Invoice

Date	Invoice #
3/31/2019	21

Bill To

Scottsdale USD No. 48
7575 E. Main St.
Scottsdale, AZ 85251

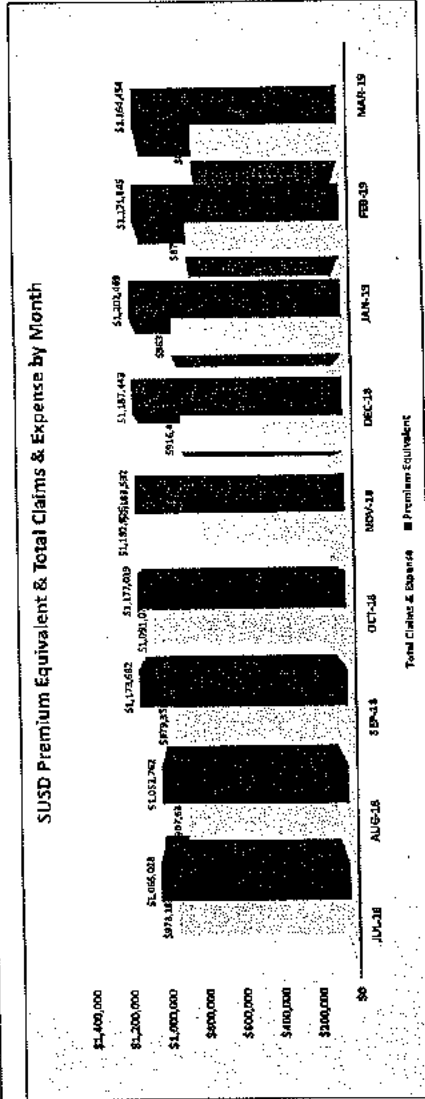
Plan Description	Census	Plan Rate	Premium
Represents Cobra premium charged to former employees collected by Chandler and recorded as contributions in Kairos for Chandler.	1	22,253.07	22,253.07

Balance Due will be extracted from your Self-Funded account balance. If you have any questions, please do not hesitate to call Jeremy Larson at (602-845-6115) or email us at accountingKAIROS@kairoshealthaz.org.

Current Month Premium	\$1,308,655.37
Payments/Credits	-\$1,308,655.37
Balance Due	\$0.00

SCOTTSDALE UNIFIED SCHOOL DISTRICT
Paid Claims Report (July 2018 - March 2019)

Month	Employees	Members	Medical Claims	Pharmacy	Stop Loss Recovered 17-18	Stop Loss Recovered 18-19	Access Fee	Admin & Stop Loss Expense	Total Claims & Expense	Total Claims & Expense PEPW	Premium Equivalent	Medical Expense Loss Ratio	Surplus / Loss
Jul-18	1,701	2,298	\$673,997	\$223,233	-\$245	\$0	\$95	\$76,102	\$973,182	\$572.12	\$1,065,028	91.4%	\$91,846
Aug-18	1,598	2,291	\$720,389	\$213,712	-\$104,227	\$0	\$1,758	\$76,000	\$907,632	\$534.53	\$1,052,762	86.2%	\$145,130
Sep-18	1,890	2,554	\$709,732	\$214,714	-\$29,855	\$0	\$1,576	\$83,189	\$979,366	\$518.18	\$1,173,682	83.4%	\$194,326
Oct-18	1,895	2,553	\$746,751	\$251,900	\$5,385	\$0	\$2,171	\$94,871	\$1,091,078	\$975.77	\$1,177,019	92.7%	\$95,941
Nov-18	1,903	2,574	\$1,079,433	\$272,247	-\$246,548	\$0	\$3,138	\$84,855	\$1,192,925	\$628.87	\$1,183,532	100.0%	-\$9,392
Dec-18	1,907	2,585	\$557,867	\$271,130	\$0	\$0	\$2,615	\$84,840	\$915,452	\$480.57	\$1,187,443	77.2%	\$270,991
Jan-19	1,923	2,598	\$650,346	\$253,746	-\$26,482	\$0	\$702	\$85,083	\$963,397	\$500.99	\$1,202,489	80.1%	\$238,072
Feb-19	1,890	2,540	\$560,380	\$257,439	-\$9,330	-\$21,083	\$139	\$84,129	\$871,675	\$461.20	\$1,171,845	74.4%	\$300,170
Mar-19	1,882	2,525	\$559,552	\$215,238	-\$488	-\$24,183	\$398	\$83,774	\$834,291	\$443.30	\$1,164,454	71.6%	\$330,183
Average/Total	1,854	2,501	\$8,258,449	\$2,173,360	-\$411,791	-\$45,287	\$12,584	\$742,543	\$8,729,987	\$523.10	\$10,378,224	84.1%	\$1,848,245



2018 - 2019 Contribution Rates:

PPD \$1,000	HOHP - Base Plan \$2,700	HOHP - Buy-Up Plan \$1,500
Rates	Rates	Rates
Avg Enrollees	Avg Enrollees	Avg Enrollees
480	528	524
\$1,125.00	\$1,000.00	\$1,000.00
\$1,066.87	\$850.00	\$850.00
\$1,889.87	\$1,241.57	\$1,533.33
595	588	581
Total		

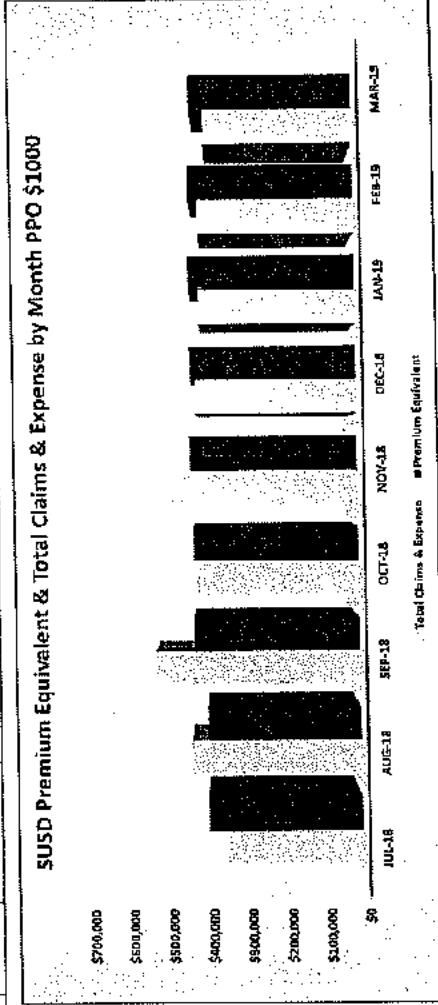
Employee
EE + Spouse
EE + Child(ren)
EE + Family
Total

SCOTSDALE UNIFIED SCHOOL DISTRICT
Paid Claims Report (July 2018 - March 2019)
PPO \$1,000 Plan

Month	Employees	Members	Medical Claims	Pharmacy	Access Fee	Admin & Stop Loss Expense	Total Claims & Expense	Total Claims & Expenses PERM	Premium Equivalent	Medical Expense Loss Ratio	*Surplus / Loss
Jul-18	580	769	\$231,210	\$106,686	\$31	\$26,054	\$362,981	\$648.18	\$411,778	88.1%	\$48,797
Aug-18	557	765	\$316,546	\$111,986	\$577	\$24,330	\$454,049	\$815.17	\$410,011	110.7%	-\$44,037
Sep-18	604	827	\$399,837	\$118,706	\$504	\$26,585	\$545,632	\$903.36	\$443,182	123.1%	-\$102,450
Oct-18	607	826	\$250,740	\$153,314	\$696	\$27,186	\$431,936	\$711.59	\$443,183	97.5%	\$11,248
Nov-18	612	832	\$432,145	\$164,555	\$1,009	\$27,225	\$624,934	\$1,021.13	\$449,465	139.0%	-\$175,469
Dec-18	607	825	\$246,411	\$157,294	\$832	\$27,005	\$431,542	\$710.94	\$445,411	96.9%	\$13,869
Jan-19	609	825	\$244,412	\$149,235	\$222	\$26,945	\$419,815	\$689.35	\$445,549	94.2%	\$25,734
Feb-19	605	819	\$236,828	\$154,601	\$45	\$26,930	\$418,405	\$691.58	\$441,961	94.7%	\$23,556
Mar-19	597	808	\$230,866	\$142,528	\$126	\$26,574	\$400,085	\$670.16	\$435,540	91.9%	\$35,456

*Surplus/Loss doesn't include also has required reserve

Average Total	595	811	\$2,588,886	\$1,257,913	\$4,042	\$238,435	\$4,089,376	\$763.23	\$3,926,081	104.2%	-\$163,296
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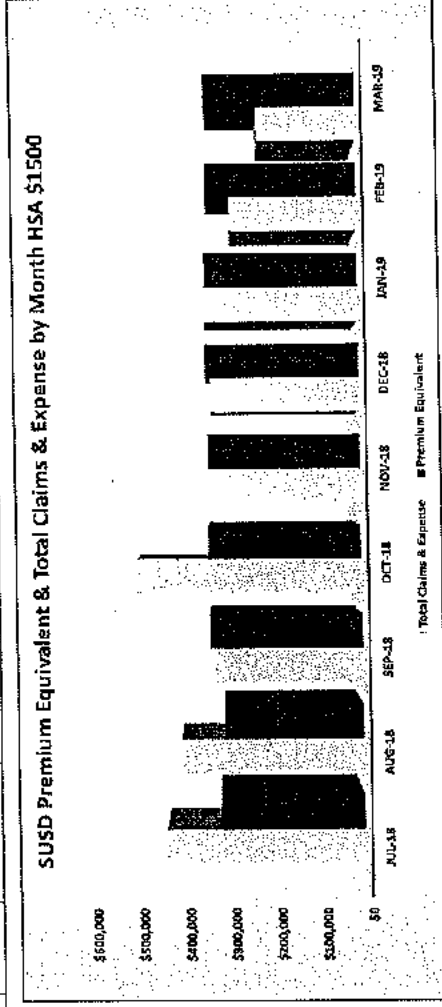


SCOTTSDALE UNIFIED SCHOOL DISTRICT
Paid Claims Report (July 2018 - March 2019)
HSA \$1,500 Plan

Month	Employees	Members	Medical Claims	Pharmacy	Access Fee	Admin & Shop Loss Expense	Total Claims & Expense	Total Claims & Expenses PERM	Premium Equivalent	Medical Expense Loss Ratio	*Surplus / Loss
Jul-18	564	688	\$328,882	\$103,279	\$32	\$25,233	\$457,425	\$811.04	\$331,767	137.9%	-\$125,659
Aug-18	581	685	\$311,330	\$85,919	\$581	\$25,109	\$422,939	\$753.90	\$321,167	131.7%	-\$101,773
Sep-18	602	736	\$231,894	\$83,004	\$502	\$26,497	\$341,898	\$567.69	\$352,933	96.8%	\$11,246
Oct-18	601	734	\$404,503	\$85,386	\$688	\$26,917	\$517,494	\$861.06	\$353,258	145.5%	-\$164,236
Nov-18	600	733	\$453,485	\$84,708	\$950	\$26,691	\$566,874	\$943.12	\$352,200	160.7%	-\$213,674
Dec-18	600	740	\$224,488	\$83,470	\$823	\$26,693	\$345,474	\$575.79	\$355,117	97.3%	\$9,643
Jan-19	600	739	\$237,918	\$92,548	\$219	\$26,547	\$357,231	\$596.39	\$354,692	100.7%	-\$2,540
Feb-19	595	730	\$187,609	\$79,514	\$44	\$26,485	\$293,652	\$493.53	\$350,108	83.9%	\$66,457
Mar-19	596	730	\$151,076	\$50,078	\$126	\$26,530	\$227,809	\$382.23	\$350,158	65.1%	\$122,349

*Surplus/Loss does not include stop loss recovery and credits

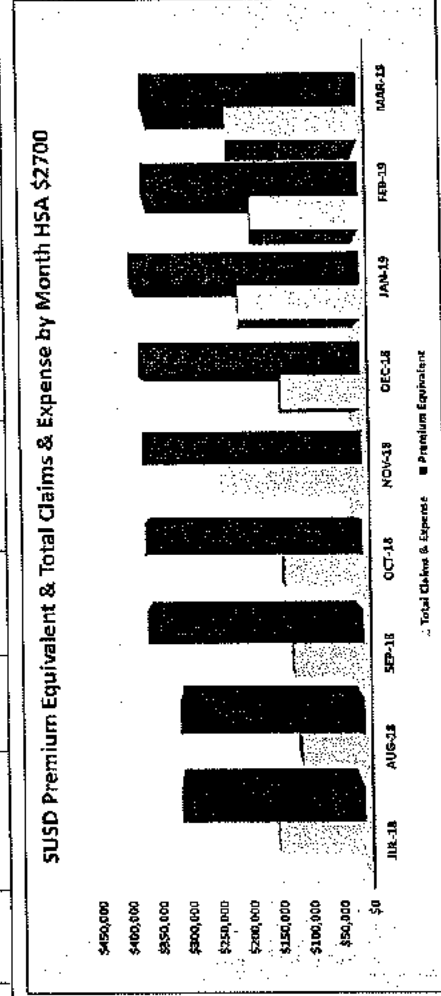
Average Total	591	724	\$2,530,975	\$757,905	\$4,004	\$236,703	\$3,529,587	\$663.58	\$3,121,400	113.1%	-\$408,187
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SCOTTSDALE UNIFIED SCHOOL DISTRICT
Paid Claims Report (July 2018 - March 2019)
HSA \$2,700 Plan

Month	Employees	Members	Medical Claims	Pharmacy	Access Fee	Admin & Stop Loss Expense	Total Claims & Expense	Total Claims & Expense PEPM	Premium Equivalent	Medical Expense Loss Ratio	*Surplus / Loss
Jul-18	577	842	\$111,488	\$12,780	\$32	\$25,815	\$150,115	\$260.16	\$321,484	46.7%	\$171,369
Aug-18	580	841	\$68,574	\$13,619	\$601	\$26,990	\$108,754	\$187.51	\$321,584	33.8%	\$212,930
Sep-18	684	991	\$77,108	\$12,700	\$570	\$30,107	\$120,484	\$176.15	\$377,557	31.9%	\$257,983
Oct-18	687	993	\$91,508	\$13,200	\$787	\$30,769	\$136,264	\$198.35	\$378,504	36.0%	\$242,240
Nov-18	691	1,002	\$183,782	\$22,777	\$1,140	\$30,739	\$248,438	\$359.53	\$381,857	65.1%	\$193,429
Dec-18	700	1,020	\$85,968	\$20,336	\$948	\$30,742	\$138,993	\$198.56	\$386,915	35.9%	\$247,922
Jan-19	714	1,024	\$168,018	\$12,964	\$261	\$31,581	\$212,833	\$298.09	\$402,229	52.9%	\$189,386
Feb-19	690	991	\$135,943	\$23,324	\$51	\$30,714	\$190,031	\$275.41	\$379,775	50.0%	\$189,744
Mar-19	689	987	\$177,621	\$22,632	\$146	\$30,570	\$231,068	\$335.37	\$378,755	61.0%	\$147,687
Average/Total	663	986	\$1,111,008	\$154,332	\$4,535	\$267,105	\$1,536,981	\$255.85	\$3,328,680	46.2%	\$1,791,699

*Surplus/loss shown and not include stop loss recovered amounts



Large Claimant Report
 Kairos Health AZ, Inc. - Scottsdale USD Claims Paid Through Month: March 2019
 Large Claims Threshold: \$50,000
 Current Policy Period - Claims Incurred 7/1/2018 - 6/30/2019

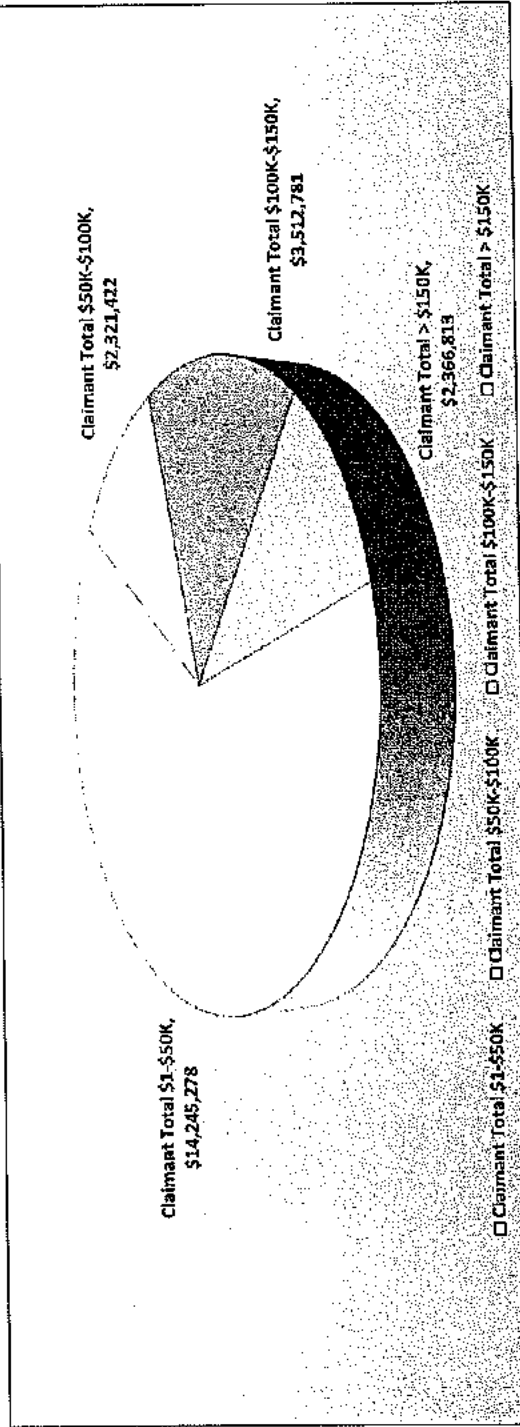
Status	Term Date	Plan Name	Care Management	Diagnosis Description	Medical Claims	Rx Claims	Total Paid Amount
Active		PPO 1000	No Mbr Response	Malignant Neoplasm Of Upper-Outer Quadrant Of Right Female Breast	\$343,548	\$1,718	\$345,266
Termed Active	1/1/2019	HDHP Buy Up HDHP Buy Up	Goals Met/Issues Addressed Case Open	Liver Transplant Status	\$116,305		\$271,401
Active		HDHP Base	No Mbr Response	Malignant Neoplasm Of Lower-Outer Quadrant Of Left Female Breast	\$228,590	\$3,250	\$231,841
Active		HDHP Buy Up HDHP Buy Up PPO 1000	No Mbr Response	Thrombosis Due To Cardiac Prosthetic Devices, Implants And Grafts, I	\$123,081	\$359	\$123,440
Active		HDHP Buy Up HDHP Buy Up PPO 1000	Declines To Consent To CM	Nonrheumatic Mitral (Valve) Insufficiency	\$120,986	\$2,244	\$123,230
Active		HDHP Buy Up HDHP Buy Up PPO 1000	Goals Met/Issues Addressed	Other Hypertrophic Cardiomyopathy	\$6,698	\$108,091	\$114,789
Active		HDHP Buy Up HDHP Buy Up PPO 1000	Declines To Consent To CM	Other Spondylosis With Radiculopathy, Lumbosacral Region	\$103,722	\$3,004	\$108,727
Active		HDHP Buy Up PPO 1000	Declines To Consent To CM	Infectious Disease	\$70,744	\$36,751	\$107,496
Active		PPO 1000	Goals Met/Issues Addressed	Sepsis, Unspecified Organism	\$26,482	\$76,257	\$102,739
Termed Active	4/1/2019	PPO 1000	Goals Met/Issues Addressed	Spondylolisthesis, Lumbar Region	\$97,825	\$35	\$97,860
Active		HDHP Buy Up PPO 1000	Screened, No Issues At Time	Secondary Malignant Neoplasm Of Bone	\$40,159	\$56,941	\$96,997
Active		HDHP Buy Up PPO 1000	Member Declined Engagement	Non-St Elevation (Nstern) Myocardial Infarction	\$89,357	\$6,558	\$95,925
Active		HDHP Buy Up PPO 1000	Goals Met/Issues Addressed	Multiple Sclerosis	\$91,882	\$3,367	\$95,029
Active		HDHP Buy Up PPO 1000	Goals Met/Issues Addressed	Malignant Neoplasm Of Central Portion Of Right Female Breast	\$87,988	\$16	\$88,004
Active		HDHP Buy Up	No Mbr Response	Malignant Neoplasm Of Upper-Inner Quadrant Of Right Female Breast	\$83,385	\$252	\$83,637
Termed	12/1/2018	HDHP Buy Up	Expired Before Needs Evaluated	Interstitial Pulmonary Disease, Unspecified	\$80,110	\$1,634	\$81,744
Active		HDHP Base PPO 1000	No Mbr Response	Perforation Of Intestine (Nontraumatic)	\$80,005	\$239	\$80,244
Active		HDHP Base PPO 1000	No Mbr Response	Type 2 Diabetes Mellitus With Other Specified Complication	\$57,664	\$11,430	\$69,095
Active		HDHP Base PPO 1000	Education	Immune Thrombocytopenic Purpura	\$88,512	\$16	\$88,528
Active		HDHP Buy Up PPO 1000	Education	Melanocytic Nev Of Right Upper Limb, Including Shoulder	\$2,213	\$56,918	\$59,131
Termed Active	3/1/2019	HDHP Buy Up PPO 1000	Education Member Declined Engagement	Non-St Elevation (Nstern) Myocardial Infarction	\$55,367	\$3,648	\$59,014
Active		PPO 1000		Malignant Neoplasm Of Thyroid Gland	\$52,227	\$3,158	\$55,385
Active		PPO 1000	Education	Anxiety Disorder, Unspecified	\$7,611	\$46,820	\$54,431
Active		PPO 1000		Other Hammer Toe(S) (Acquired), Unspecified Foot	\$13,098	\$40,879	\$53,977

SCOTTSDALE UNIFIED SCHOOL DISTRICT

High Cost Claimants Overview

Paid through March 2019

High Cost Claimant	Claimants	Claimants %	Paid	Paid %	Paid/Claimant
Claimant Total \$1-\$50K	2,034	98.5%	\$14,245,278	63.5%	\$7,003.58
Claimant Total \$50K-\$100K	9	0.4%	\$2,321,422	10.3%	\$257,935.81
Claimant Total \$100K-\$150K	18	0.9%	\$3,512,781	15.6%	\$195,154.52
Claimant Total > \$150K	3	0.1%	\$2,366,813	10.5%	\$788,937.63
Summary	2,064	100.0%	\$22,446,294	100.0%	\$10,875.14



Begin forwarded message:

From: Pam Kirby <pam.kirby@hotmail.com>

Subject: Financial Policy

Date: April 23, 2019 at 7:28:45 PM MST

To: Allyson Beckham <abeckham@susd.org>, Sandy Kravetz <skravetz@susd.org>

FINANCIAL POLICIES

OPERATING BUDGET POLICIES

1. Ongoing operating expenditures will be supported by ongoing, stable revenue sources.
2. Revenues will not be dedicated for specific purposes unless required by law or generally accepted accounting practices (GAAP). All non-restricted revenues will be deposited in the General Fund and appropriated by the budget process.
3. The Town shall not rely on a local property tax to pay for its expenditures.
4. The Town's compensation policy shall provide for regular review with respect to employment market adjustment, and provision of merit based salary adjustments.
5. Operating expenses will not be funded by debt issuance.
6. Cost recovery fees, where appropriate, may be established to offset the cost of providing specific services, and will be reviewed at least on an annual basis.
7. All non-enterprise user fees and charges will be examined annually to determine the direct and indirect cost of service recovery rate. The acceptable recovery rate and any associated changes to user fees and charges will be approved by the Town Council.
8. Enterprise fund rate structures will be reviewed annually to ensure they are adequate for the funds to remain separately self-supporting, including the costs of operation, capital outlay, debt service, depreciation, and interdepartmental charges for services where practical and appropriate.
9. The Town shall prudently maximize its investment income, generally to be used for expenditures not subject to the State imposed expenditure limitation.
10. Shifts in appropriations within fund and department totals not exceeding \$50,000 may be done administratively on the authority of the Town Manager by transferring budgeted funds from one department to another department to avoid contingency fund expenditure. Procedures for appropriations transfers and delegation of budget responsibility will be set by the Town Manager.
11. Shifts within department appropriations between personnel expenditures, expenses, capital leases, and photo radar expenditures may be done administratively on the written authority of the Town Manager.
12. Electronic funds transfer may be used to pay payroll expenditures and employee benefits previously authorized by Council or required by law.

CAPITAL BUDGET POLICIES

1. A seven-year capital improvement plan shall be prepared and updated each year.

2. The seven-year capital improvement plan will be developed within the constraints of the Town's ability to finance improvements. Therefore, the CIP shall differentiate between those projects which will be financed from designated, recurring revenues and those which will be financed from the future capital project fund.
3. Operating costs to maintain capital improvements and additional resource needs will be estimated and identified as part of the capital project review process.
4. The Town Council shall designate revenue sources for financing recurring capital improvement projects such as street resurfacing. These revenue sources will be available to finance such projects on an ongoing basis.
5. A separate capital project fund shall be created. All funds accumulated in this fund shall be used exclusively for capital projects, but only after specific authorization by the Town Council.
6. Project appropriations and amendments shall be consistent with the capital improvement plan and must be approved by the Town Council.

CONTINGENCY AND RESERVE POLICIES

1. The General Fund adopted budget shall contain two contingency appropriations. This amount shall be included in the Town's annual reserve requirements. It shall be an amount of no less than 1% of the adopted budget total, but no more than 3% of the adopted budget total. The operating contingency account shall be funded from current revenues, just as any other planned operating expenses. The second shall be an account for emergencies which is funded by reserves and be an amount at least equal to 15% of the adopted budget total. Contingency appropriations supported by current revenues which are less than \$25,000 do not require Town Council approval. All uses of contingency appropriations not supported by current revenues must be specifically approved by the Town Council, either by motion or resolution.
2. A reserve equal to at least 90%, but not more than 110%, of the annual general governmental (General and HURF funds) operating expenditures will be maintained for unforeseen emergencies, such as significant loss of revenues or catastrophic impacts on the Town. Any amount budgeted for emergency contingencies shall be included in the calculation of reserves.
3. At the end of any fiscal year, any positive variance achieved by the general and HURF funds shall first be used to maintain a reserve of 110%. Should the positive variances realized exceed the amount needed to maintain the 110% level, the difference shall be transferred to the future capital project fund.
4. The adopted Capital Improvement Budget shall include a contingency appropriation equal to at least 10% of the budgeted amount.
5. The capital project fund shall maintain a reserve of at least \$1.0 million.
6. All fund designations and reserves will be evaluated annually for long-term adequacy and use requirements in conjunction with development of the Town's five-year financial plan.

DEBT SERVICE POLICIES

1. Long-term debt shall not exceed the Town's resources for repaying the debt.
2. Capital lease purchasing shall generally be used for financing capital equipment and land purchases and building improvements to remove the expenditures from the State imposed expenditure limitation.
3. Bond issuance shall be limited to capital improvement projects too large to be financed from current revenues, or too large to be included in the State imposed expenditure limitation.
4. Long-term debt payment schedules shall not exceed the expected useful life of the project.

FINANCIAL REPORTING POLICIES

1. The Town's accounting and financial reporting systems will be maintained in conformance with all state and federal laws, generally accepted accounting principles (GAAP) and standards of Government Accounting Standards Board (GASB) and the Government Finance Officers Association (GFOA).
2. A budgetary control system will be maintained to ensure compliance with the budget. Monthly reports will be distributed to the Town Manager and Departments for management of the budget. Quarterly reports will be prepared for Council for review.
3. Financial systems will maintain internal controls to monitor revenues, expenditures, and program performance on an ongoing basis.
4. An annual audit will be performed by an independent public accounting firm, with an audit opinion to be included with the Town's published Comprehensive Annual Financial Report (CAFR).
5. The Town's CAFR will be submitted to the GFOA Certification of Achievement for Excellence in Financial Reporting Program. The financial report should be in conformity with GAAP, demonstrate compliance with finance related legal and contractual provisions, disclose thoroughness and detail sufficiency, and minimize ambiguities and potentials for misleading inference.
6. Effective July 1, 2012 and thereafter, the Town's budget will be submitted to the GFOA Distinguished Budget Presentation Program. The budget should satisfy criteria as a financial and programmatic policy document, as a comprehensive financial plan, as an operations guide for all organizational units and as a communications device for all significant budgetary issues, trends and resource choices.

GLOSSARY OF TERMS

Actual vs. Budgeted: Difference between what was projected (budgeted) in revenues or expenditures at the beginning of the fiscal year and the actual receipts or expenses which are incurred by the end of the fiscal year.

Adoption: Formal action by the Town Council which sets the spending limits for the fiscal year.

Appropriation: An authorization made by the Town Council which permits the town to incur obligations to make expenditures for specific purposes.

Asset: A resource owned or held by a government which has monetary value.

Bond: A written promise to pay a sum of money on a specific date at a specified interest rate. Bonds are primarily used to finance capital projects.

Budget: A financial plan for a specified period of time that matches planned revenues and expenditures to municipal services. Town of Paradise Valley prepares a budget each fiscal year.

Budgetary Control: The control or management of a governmental unit or enterprise in accordance with an approved budget for the purpose of keeping expenditures within the limitations of authorized appropriations and available revenues.

Capital Budget: The capital budget consists of the Five Year Capital Improvement Program and the capital outlay needs for the current fiscal year.

Capital Improvement Program: The Capital Improvement Program is a comprehensive five year plan of capital projects which identifies priorities as to need, method of financing, and project cost and revenues. The program is a guide for identifying current and future fiscal year requirements and becomes the basis for determining the annual capital budget

Capital Projects Fund: Capital Projects Funds are used to account for financial resources to be used for the acquisition or construction of major capital facilities (other than those financed by Proprietary Funds and Trust Funds).

Contingency: A budgetary reserve set aside for emergency or unanticipated expenditures.

Debt Service: The cost of paying principal and interest on borrowed money according to a predetermined payment schedule.

Debt Service Fund: A fund established to account for the accumulation of resources for, and the payment of, general long-term debt principal and interest.

Deficit: An excess of expenditures over revenues.

Department: The basic organizational unit of government which is functionally unique in its delivery of services.

Employee (or Fringe) Benefits: Contributions made by a government to meet commitments or obligations for employee benefits. Included are the government's share of costs for Social Security and the various pension and insurance plans.

Encumbrance: The legal commitment of appropriated funds to purchase an item or service. To encumber funds means to set aside or commit funds for a specified future expenditure.

Enterprise Funds: Enterprise Funds are used to account for operations including debt service (a) that are financed and operated in a manner similar to private businesses - where the intent of the government body is that the costs (expenses, including depreciation) of providing goods and services to the general public on a continuing basis is financed or recovered primarily through user charges; or (b) where the governing body has determined that periodic determination of revenues earned, expenses incurred, and/or net income is appropriate for capital maintenance, public policy, management control accountability, or other purposes.

Estimated Revenue: The amount of projected revenue to be collected during the fiscal year.

Expenditure Limitation: The Arizona State Legislature imposed constitutional amendment which limits the annual expenditures of all municipalities. The limit is set by the Economic Estimates Commission based on population growth and inflation.

Expenditure/Expense: The outflow of funds paid for an asset obtained or goods and services acquired.

Fiscal Policy: A government's policies with respect to revenues, spending, and debt management as these relate to government services, programs and capital investment. Fiscal policy provides an agreed-upon set of principles for the planning and programming of government budgets and their funding.

Fiscal Year: A twelve-month period designated as the operating year for accounting and budgeting purposes in an organization. Town of Paradise Valley has specified July 1 through June 30 as its fiscal year.

Fixed Assets: Assets of long-term character that are intended to continue to be held or used, such as land, building, machinery, furniture, and other equipment.

Franchise Fee: A fee (or tax) on utility companies such as gas and electric companies for their use of town rights-of-way, based on a percentage of their gross receipts.

Fund: A set of inter-related accounts to record revenues and expenditures associated with a specific purpose. Fund structure consists of Governmental Funds (General, Special Revenue, Capital and Debt Service Funds), Fiduciary (Trust) Funds, and Proprietary (Enterprise) Funds.

Fund Balance: The difference between revenues and expenditures. The beginning fund balance represents the residual funds brought forward from the previous year (ending balance).

General Fund: The General Fund is the general operating fund of the town. It is used to account for all activities of the town not accounted for in some other fund.

Governmental Revenue: The revenues of a government other than those derived from and retained in an Enterprise Fund.

General Obligation Bond: This type of bond is backed by the full faith, credit and taxing power of the municipality. Bonds that finance a variety of public projects such as streets, buildings, and improvements; the repayment of these bonds is usually made from secondary property taxes, and these bonds are backed by the "full faith and credit" of the issuing government.

Generally Accepted Accounting Principles (GAAP): GAAP are the uniform minimum standards and guidelines to financial accounting and reporting. They govern the form and content of the basic financial statements of an entity. GAAP encompasses the conventions, rules, and procedures necessary to define the accepted accounting practices at a particular time. They include both broad guidelines of general application and detailed practices and procedures. GAAP provide a standard by which to measure financial presentations.

Grant: A contribution by a government or other organization to support a particular function. Grants may be classified as either operational or capital, depending upon the grantee.

Highway User Revenue Fund: The Special Revenue Fund that accounts for transportation related revenue and expenditures associated to the construction or maintenance of town streets. This revenue source consists of state taxes collected on gasoline and a number of other additional transportation related fees. These funds must be used for street and highway purposes.

Infrastructure: The physical assets of a government (e.g., streets, water, sewer, public buildings, and parks).

Lease-Purchase Agreement: A contractual agreement by which capital outlay may be purchased by making annual lease payments.

Line-Item Budget: A budget that lists each expenditure category (salary, materials, telephone service, travel, etc.) separately, along with the dollar amount budgeted for each specified category.

Local Transportation Assistance Fund: An intergovernmental state shared revenue generated by the state lottery. Distribution of these funds is based on population.

Long-Term Debt: Debt with a maturity of more than one year after the date of issuance.

Maturity Date: The date by which long-term debt will be paid off.

Municipal Property Corporation: A non-profit corporation with the main purpose of providing a financing alternative by issuing bonds to fund the cost of acquiring, constructing, reconstructing, and improving various municipal properties and buildings suitable for use by and for leasing to the town. MPC bonds do not require voter approval and are not considered debt to the municipality.

Special Revenue Fund: Special Revenue Funds are set up as accounts for monies legally restricted to expenditures for specific purposes. Special Revenue Funds include the Highway User Fund, the Donations Fund, and various grant funds.

Begin forwarded message:

From: Kim Hartmann <kimh@kchsolutions.net>

Subject: Enrollment Info

Date: April 30, 2019 at 10:57:04 AM MST

To: Sandy Kravetz <skravetz@susd.org>

Hi Sandy,

I didn't see you at the Charro event on Friday. I brought a copy of this for you. This is the Applied Economics with the Actual Enrollment to K-8 Population (E2P) calculations I mentioned.

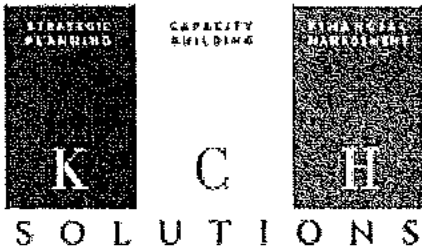
For example, you will see at the time, Yavapai is capturing only 454 students of the total 1198 or 38% of the students in their boundaries. The 20-50% I believe represents the range AE estimated. The 38% falls within that range. Looking at this data from the opportunity direction, Yavapai has a potential of capturing an additional 744 students.

In total as a District, this study indicated SUSD schools are only capturing 8,449 of 20,581 of 41% of our total population of kids. We can view this as a problem or an opportunity. I lean towards the opportunity side since each of the 8,449 kids we are not capturing is ADM going elsewhere.

Feel free to share this or call with any questions.

Kim Hartmann
CEO | KCH Solutions LLC

602.448.4898
KimH@KCHSolutions.net
www.KCHSolutions.net



Nonprofit Lifecycles Institute
www.nonprofitlifecycles.com

The following table summarizes the 2018 Applied Economics Report information, AZMERIT results and 40th Day actual ADM. The purpose of this document is to understand SUSD's K-5/8 Current State Enrollment, Current State Enrollment as a percentage of actual population (E2P) and ten year projected Future State Enrollment based upon current capture rate. With this information each K-5/8 site can determine their own growth strategy understanding their potential capture of currently uncaptured in-boundary students. By comparing the current and future capture rates, the E2P capture potential and the AZMERIT scores begins to inform a future product enhancement and/or marketing growth strategy.

K-5/8 School	Grades	2018*			10 Year Projections			Out-of-Dist Capt.***			Enrollment by Attend Area***				E2P**			5th Grade AZMERIT		Enrollment Strategy	
		Pre	K-5/8	Total	K-5/8	Change	Change %	Total	%		Within	Other	Total	Within %	Ratio	Pop.	Capt %	ELA	Math	Projection	Desire
Arcadia	KS	0	750	750	684	-66	-9%	114	15%	498	75	573	87%	13%	50-60%	1086	53%	81%	85%	Growth	
1 Hopi	KS	48	641	689	581	-60	-9%	308	45%	334	244	578	58%	47%	> 80%	685	84%	50%	45%	Growth	
2 Tavan	KB	17	390	407	324	-66	-17%	171	42%	NA	NA	NA	NA	NA	50-60%	557	NA	52%	52%	Growth	
3 Echo Canyon																					
Chaparral	KS	109	669	778	826	157	23%	197	25%	343	37	380	90%	10%	20-50%	1479	26%	91%	83%	Maintain	
4 Cherokee	KS	25	573	598	637	64	11%	57	10%	945	100	445	78%	22%	70-80%	819	54%	81%	81%	Maintain	
5 Cochise	KS	1	491	492	501	10	2%	182	37%	266	84	350	76%	24%	20-50%	1022	34%	73%	73%	Maintain	
6 Sequoia																					
Coronado	KS	45	449	494	459	10	2%	65	13%	244	175	419	58%	42%	50-60%	736	57%	66%	51%	Maintain	
7 Hohokam	KS	43	433	476	454	21	5%	70	15%	212	208	420	50%	50%	10-50%	1125	37%	71%	71%	Maintain	
8 Pima	KB	24	870	894	753	-117	-13%	119	13%	598	606	1204	50%	50%	70-80%	1509	80%	37%	36%	Growth	
9 Tonalea	KS	47	286	333	276	-10	-3%	26	8%	227	227	454	50%	50%	20-50%	1198	38%	31%	47%	Growth	
10 Yavapai																					
DM	KS	37	483	500	431	-32	-7%	49	10%	413	295	708	58%	42%	50-60%	2459	29%	86%	87%	Growth	
11 Desert Canyon	KS	19	474	493	493	19	4%	43	9%	359	552	911	39%	61%	20-50%	1676	54%	77%	71%	Maintain	
12 Redfield	KB	25	930	955	825	-105	-11%	111	12%	NA	NA	NA	NA	NA	> 80%	748	NA	87%	51%	Growth	
13 Cheyenne	KS	25	378	403	381	3	1%	98	24%	239	218	457	52%	48%	50-60%	1291	35%	85%	86%	Growth	
14 Anasazi	KS	90	395	485	426	31	8%	29	6%	284	164	448	63%	37%	70-80%	1675	27%	79%	81%	Maintain	
15 Laguna																					
Seguaro	KB	31	477	508	436	-41	-8%	70	14%	188	235	423	44%	56%	20-50%	729	56%	75%	73%	Growth	
16 Five	KS	41	303	344	272	-31	-10%	43	15%	220	459	679	32%	68%	70-80%	1043	65%	42%	52%	Growth	
17 Navajo	KS	85	479	564	442	-37	-6%	72	13%	NA	NA	NA	NA	NA	> 80%	744	NA	85%	68%	Growth	
18 Pueblo																					
Total		717	9451	10168	9201	-250	-3%	1824	18%	4770	3679	8449	56%	44%		20581	41%	69%	69%		

* October 5, 2018 (Day 40) actual numbers
** Per Applied Economics Enrolled K-5/8 students as a % of total K-5/8 Census Tract information. Allocation between schools should be reconfirmed by AE)
*** Per Applied Economics Table 18

Rebuild considerations
41 Navajo students - Yavapai/PreK @ 24 and Hohokam/Panda @ 17

From: Pam Kirby <pam.kirby@hotmail.com>

Subject: Fwd: Cash Controlled Funds

Date: January 17, 2019 at 5:14:48 PM MST

To: Allyson Beckham <allysonmadrid@yahoo.com>, "sekravetz@gmail.com" <sekravetz@gmail.com>

Sent from my iPhone

Begin forwarded message:

From: John Kriekard <jkriekard@susd.org>

Date: January 17, 2019 at 5:08:26 PM MST

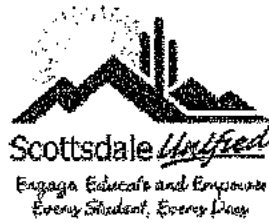
To: Pam Kirby <pam.kirby@hotmail.com>

Cc: Jeffrey Gadd <jgadd@susd.org>

Subject: RE: Cash Controlled Funds

Property/casualty and workmens comp is not broken out. That account can be used for either type of claim not to exceed \$16m.

The other questions I understand, but want to be clear on what is written, so I will have Jeff Gadd respond to these next week. Sorry.



Dr. John Kriekard

Acting Superintendent

Scottsdale Unified School District

Mohave District Annex

8500 E. Jackrabbit Rd., Scottsdale, AZ 85250

Office 480.484.6120

Cell 602.717.4712

From: Pam Kirby <pam.kirby@hotmail.com>
Sent: Thursday, January 17, 2019 4:58 PM
To: John Kriekard <jkriekard@susd.org>
Cc: Jeffrey Gadd <jgadd@susd.org>
Subject: Re: Cash Controlled Funds

Dr. Kriekard,

Thanks for the email. I understand that the "Self Insurance" account is \$16 million and is property casualty and/or workman's comp. Can you break that out? Also, do we have any maximum caps on SUSD's liability for a single event? Are there caps on SUSD's liability for a single year?

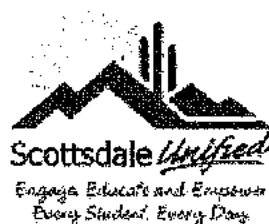
For example, I remember Dr. Virgil stating that on medical, we are capped on how much we pay out for a catastrophic illness.

Medical is \$24 million if "the rest of the \$40 is medical". Please advise if this is sitting in a district cash controlled account or in a trust with Kairos or somewhere else all together.

Thanks,
Pam

From: John Kriekard <jkriekard@susd.org>
Sent: Thursday, January 17, 2019 4:51 PM
To: Pam Kirby
Cc: Jeffrey Gadd
Subject: RE: Cash Controlled Funds

The \$16m is property/casualty and/or workmans comp. The rest of the \$40m is medical.



Dr. John Kriekard
Acting Superintendent
Scottsdale Unified School District
Mohave District Annex
8500 E. Jackrabbit Rd., Scottsdale, AZ 85250
Office 480.484.6120
Cell 602.717.4712



From: Pam Kirby <Pam.Kirby@hotmail.com>

Sent: Thursday, January 17, 2019 1:56 PM

To: John Kriekard <jkriekard@susd.org>

Subject: Cash Controlled Funds

Dr. Kriekard,

I have a question regarding the "Self-Insurance" fund on the AFR. Can you describe how the \$16million in this fund at the end of FY18 is broken out? Is this worker's comp, property and medical? Is this a cash controlled fund?

Thank you,

Pam

Begin forwarded message:

From: Allyson Beckham <abeckham@susd.org>
Subject: Fw: The Trust
Date: June 5, 2019 at 9:35:40 AM MST
To: Sandy Kravetz <skravetz@susd.org>

I just realized you weren't on this email. I left Dr. Kriekard a voice message a few minutes ago. I do not feel Mr. Gadd has answered my questions below. I asked Dr. Kriekard to help with the communication between myself and Mr. Gadd.

The easiest one to explain is the request for all the bank, investment statements. We have only received a thumb drive with one account statement up till 12/2018. If and when you get any other statements please let me know.

Allyson

From: John Kriekard
Sent: Thursday, May 30, 2019 5:24 PM
To: Allyson Beckham
Subject: FW: The Trust

Allyson,
I received this from Jeff on May 13. Did I not send it on to you? If I didn't I apologize. Let me know if these answers are not sufficient.
John

<image009.png>

<image010.png>

Dr. John Kriekard
Superintendent
Scottsdale Unified School District
Mohave District Annex
8500 E. Jackrabbit Rd., Scottsdale, AZ 85250
Office 480.484.6120
Cell 602.717.4712
[REDACTED]

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<image008.png>

From: Jeffrey Gadd <jgadd@susd.org>
Sent: Monday, May 13, 2019 4:24 PM
To: John Kriekard <jkriekard@susd.org>
Subject: RE: The Trust

*John,
Enclosed are the answers to Allyson's questions. - We
need Trust action to approve next year insurance
coverage. Please see the answers below in red.*

From: Allyson Beckham <abeckham@susd.org>
Sent: Monday, May 13, 2019 9:05 AM
To: John Kriekard <jkriekard@susd.org>
Cc: Michelle Marshall <mmarshall@susd.org>; Sandy Kravetz <skravetz@susd.org>
Subject: The Trust

Dear Dr. Kriekard,

Thank you for providing time to meet before the GB meeting on Tuesday regarding the Self-Insurance Trust. I was hoping to meet on Friday or Monday before the Agenda notice was posted to the public.

I request the the Self-Insurance Trust be pulled for further discussion and clarification and not be posted to the Agenda as an Action item at this time.

Sandy Kravetz, who is a Trustee on the Self-Insurance Board, and I have been asking questions since February and had a meeting with Jeff Gadd two weeks ago on May 1. During the meeting we learned how much information and data was incomplete from Trust meeting minutes to financial statements. I strongly suggested that all GB members should be aware of this information before Action is taken in a board meeting. Mr. Gadd said that was your decision and I needed to talk with you. Since, you were unavailable the last several weeks this is the first time I will be able to talk with you. I am assuming Mr. Gadd has discussed my concerns and issues.

We provided the minutes from the Trustee Meeting from 2016 and 2017 on Friday May 10th.

Below is an example of what I have been requesting and would like to have before the district moves forward with revising the Trust. I believe all the GB members would be interested in this information before making a decision. I know Sandy Kravetz has had a difficult time getting information she has requested, some of which is included in this list.

1. Complete and accurate financial statements of the existing Trust. FY17 audited Financial Statements have been provided FY 18 audit is underway.
2. Complete and accurate understanding of the investment accounts including accurate return on the investments the past five years. (A summary was shared with Sandy and I on May 1 by the Wells Fargo advisor. Additional information was requested and should be shared with other board members.) Tom from Wells Fargo provided a wealth of information when we met on May 1st with Allyson and Sandy.
3. An actuarial account on the dollar amount that should be held in the Trust for the three different insurance programs to adequately cover costs and potential liability. (Mr. Gadd has provided some of this information.) We prorated account balances according to annual premium obligations. In other words, we matched revenue to need. We provided this information on several occasions.
4. An accurate account of the funds available from these three programs that aren't needed for expenses and potential liability and could be used for students services and programs that can be spent right now or that could be used for one-time operating expenses? (Mr. Gadd summary provides a number yet, the discussion has not taken place as to the best use of these dollars.)A 5 year projection was provided at the Board meeting on April 16th.
5. A complete understanding of the medical self-insurance program and business arrangement with Kairos and Ashton Tiffany, including available reports generated by Ashton Tiffany. (A broad explanation has been given but the data and reports have not been shared.) Allyson received an email explaining that Ashton Tiffany is a contractor hired by Kairos Trust to administer the medical program. We have attached the most recent report on medical from Aston Tiffany.

Regarding the actual Trust document: I believe the document itself is near completion pending the above information which might or might not change components of the document.

Thank you,

Allyson Beckham